



# RED C Sustainability Monitor

## *Environmental Attitudes and Behaviours in Ireland*

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# Monitoring Sustainability

RED C has been tracking consumer views and behaviours pertaining to sustainability and the environment in the Republic of Ireland since July 2019.



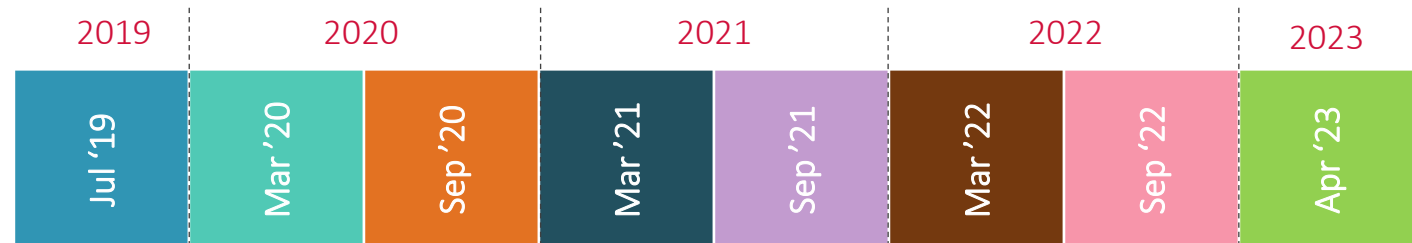
## The RED C Sustainability Monitor – tracking behaviour since July 2019

This latest edition of RED C's Sustainability Monitor (previously published in September 2022) looks at consumer views on sustainability issues in Ireland.

Questions were tested on RED C's own online omnibus service, **RED Line**, in Ireland. A nationally representative sample of adults aged 18+ surveyed as follows:

/ n=1,000 in Ireland, with fieldwork in current wave conducted between 6<sup>th</sup> – 11<sup>th</sup> and 21<sup>st</sup>-26<sup>th</sup> April 2023

### Months covered in RED C Sustainability Monitor



# Cost of living pressure puts sustainability spotlight on brands



RED C Consumer Sustainability Monitor – April '23



1

Despite optimism following the end of the COVID-19 pandemic, Irish consumers find themselves mired in a cost of living crisis which seems to have no immediate end in sight. This negative mood seems to be having a halo effect on views pertaining to the climate crisis, the environment, and sustainability generally, which have a more abstract feel to them now than in years past.

2

Although consumers overall are doing what they can in this space through recycling and in reducing energy, it is clear that some behaviours such as flying less and in eating more plant-based foods remain a much taller task, particularly with meat-consumption with men and flying less with higher social grades. Brand messaging from travel and food industries could be a game-changer here.

3

Consumers have not completely lost hope, and feel there is still time to reverse the effects of climate change. This seems to be a positive view to hold, although there is also an underlying sense of a lack of urgency in this view. Continuing to inform consumers on the impact of their product choices could help serve as sober reminders, perhaps through clear environmental impact labelling.

4

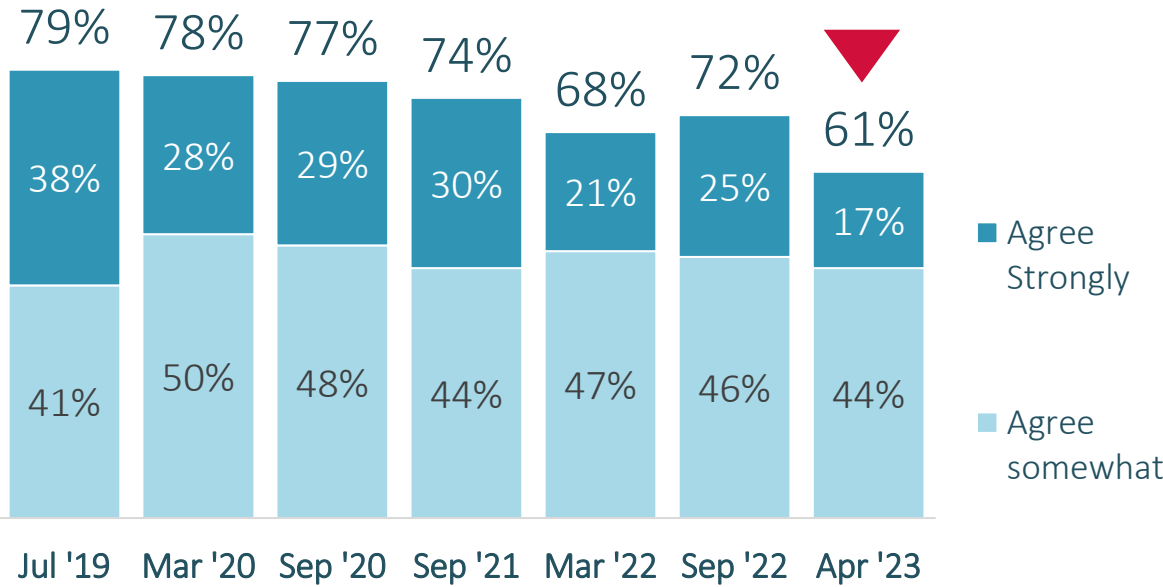
The reality is that consumers generally are cutting back on spending, but many still want to live sustainably and seek affordability in order to do this. Ultimately, brands would do well to find ways to do this, or to at the very least clearly demonstrate how spending slightly more for a product or service helps consumers fulfil their civic duty in lessening their impact on the environment.



In the wake of the Covid-19 pandemic and now in the midst of a lingering cost of living crisis, consumers' resolve on sustainability and the environment is being put to the test

# Hope fading that one can help improve environment, at lowest point since 2019

I believe my personal actions can improve the environment



▲ ▼ Indicates significant difference vs. Sep '22  
 Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

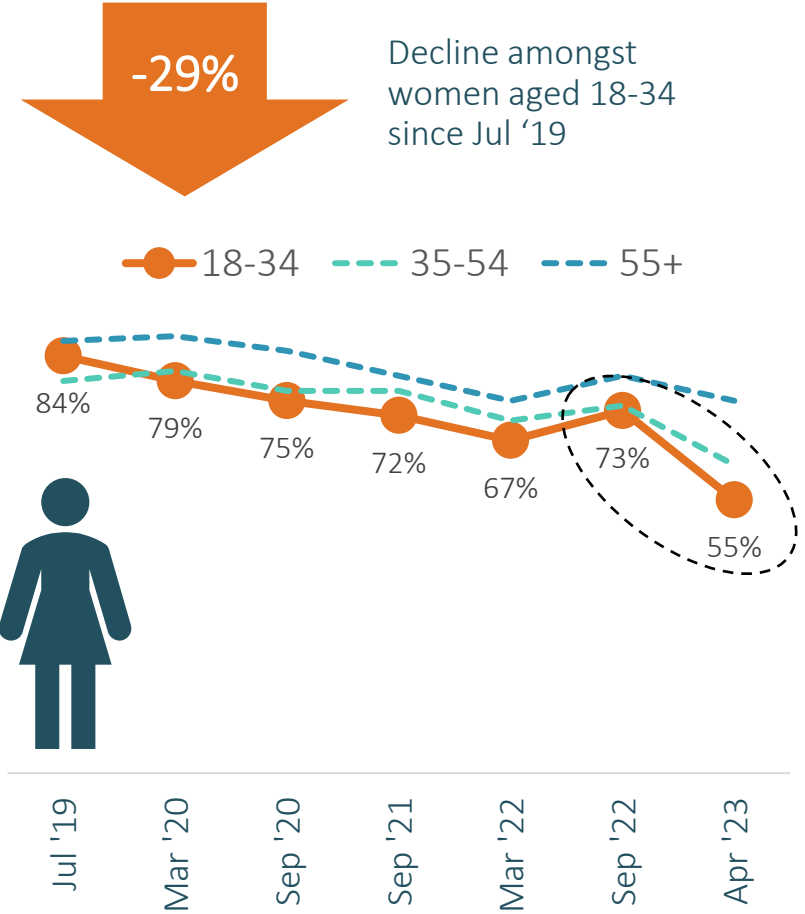
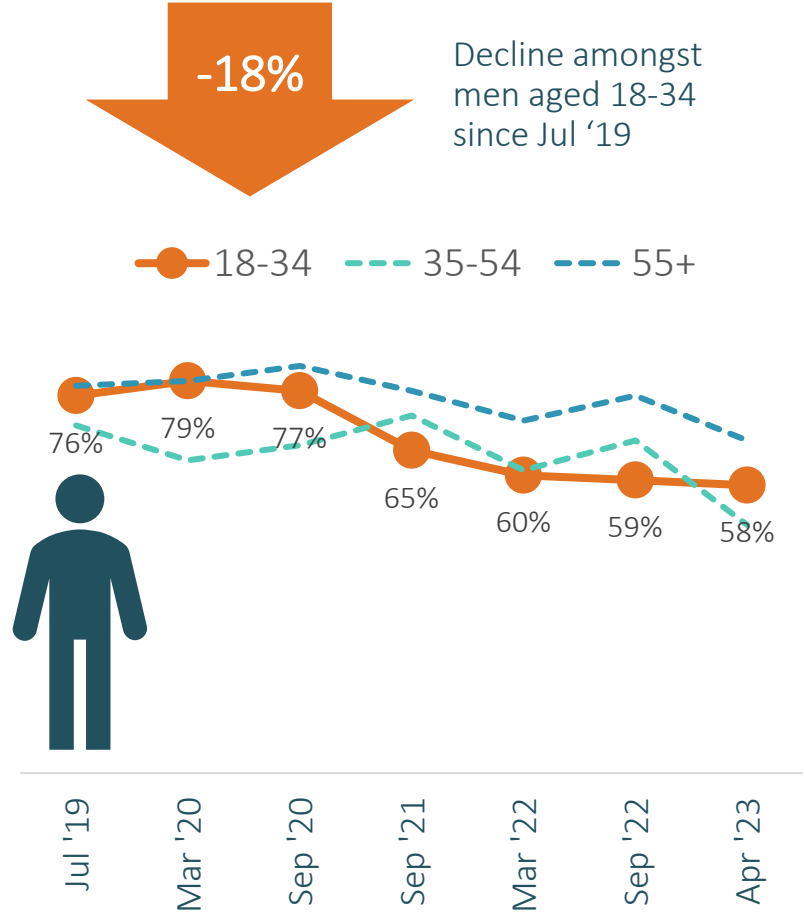
(Base: all adults aged 18+)



# Decline in hope especially driven by young women

Although there is a decline in belief amongst all groups, young women's belief has tumbled the most since July '19 and especially since Sep '22.

## Belief that one's personal actions can improve the environment

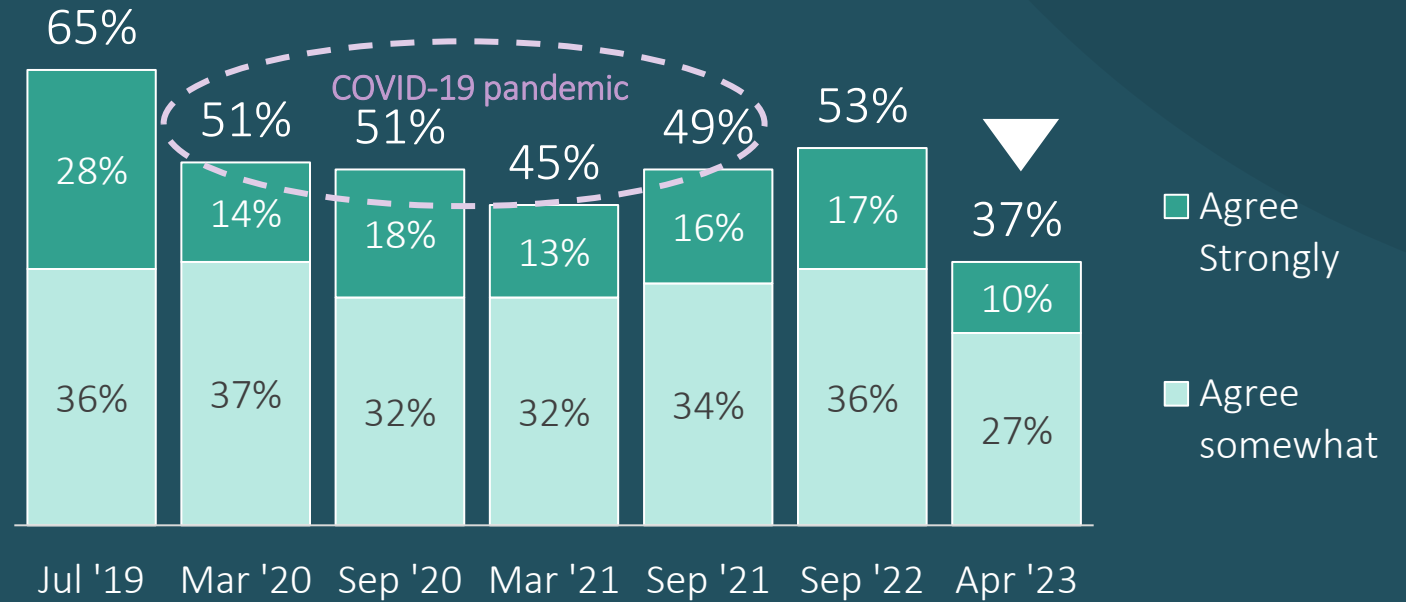


(Base: all adults aged 18+)

# On the back of the pandemic and cost of living crisis, environmental problems are seen to be even more abstract

Since Sep '22, agreement drops significantly that environmental problems have a direct effect on one's life, with this decline especially driven by women and those with children.

Environmental problems have a direct effect on my life today



▲ ▼ Indicates significant difference vs. Sep '22  
 Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?  
 (Base: all adults aged 18+)

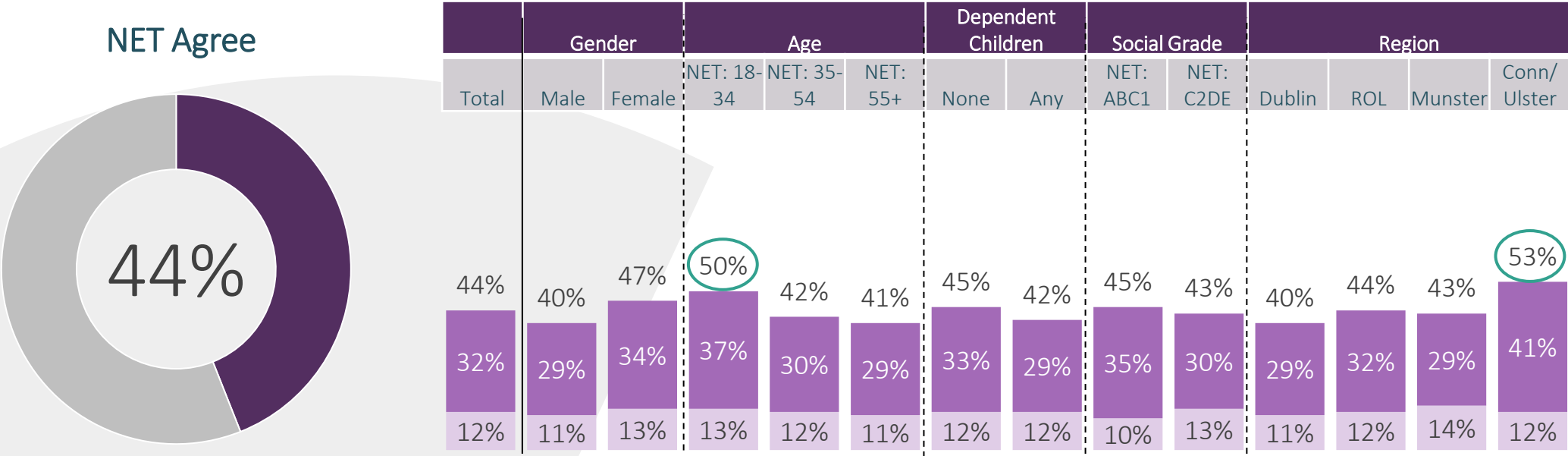
# Climate 'burn out' is having strong effect on 18-34-year-olds



There are some consumers – especially younger people – who admit to trying to not think about the climate crisis because of how depressing it is. This is also the case in the Conn/Ulster region.

I try not to think about the climate crisis because of how depressing it is

NET Agree  
 Strongly Agree  
 Somewhat Agree



○ Significantly higher/lower than national average

(Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?)

(Base: all adults aged 18+)





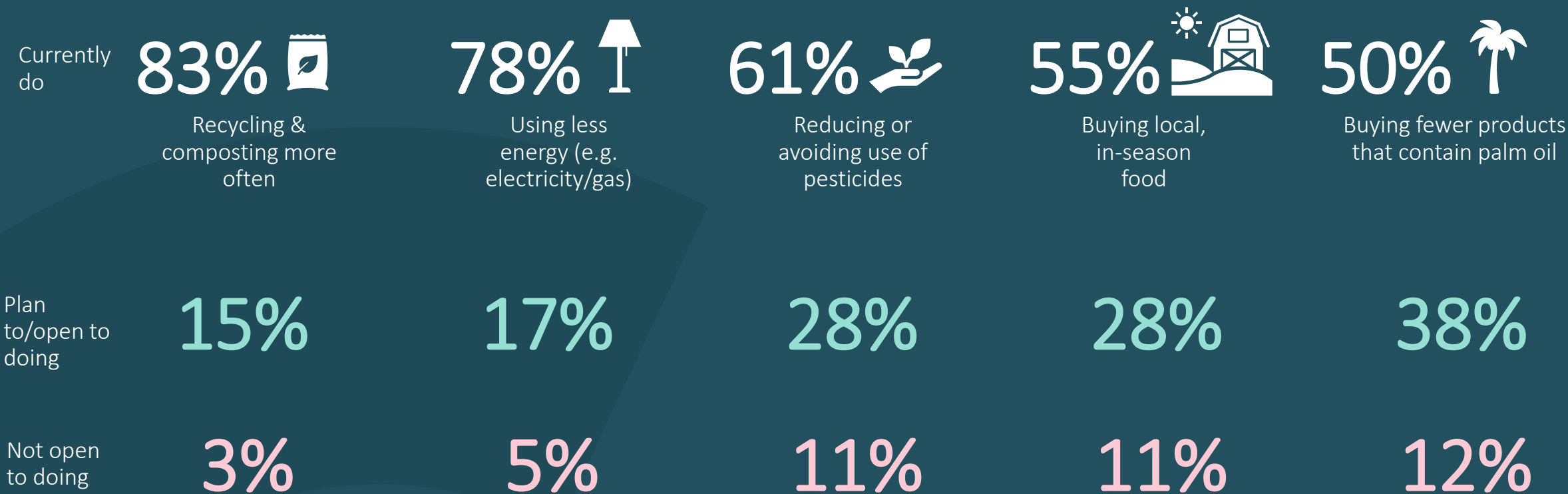
Consumers are willing to bear some of the 'sustainability' burden, but sizable number are not open to behaviours which are widely-known to significantly reduce one's carbon footprint

# Recycling and energy use are popular ways to lower one's impact



A majority are already recycling/composting more often; using less energy; buying local, in-season food; reducing/avoiding pesticide use; and avoiding products that contain palm oil

## Actions willing to do to lower environmental impact – Summary I



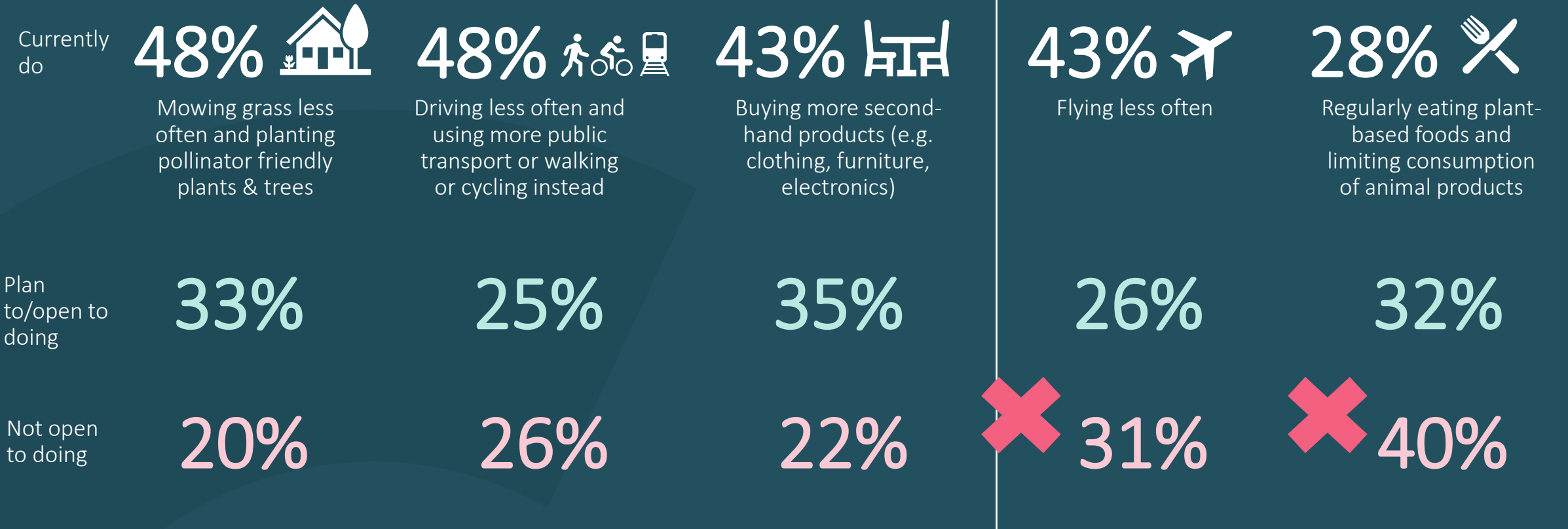
Q7. Below are a range of actions known to lower our environmental impact and help tackle the climate crisis. Please select whether you are doing this already if you are open to doing it, or if you are not open to doing it at all. (Base: all adults aged 18+)



# However, strong resistance to flying less and eating less meat

Apart from those who are already doing it, more are not open to flying less often, and eating more plant-based foods, than are open to it. Among drivers, roughly half are open to driving less often.

## Actions willing to do to lower environmental impact – Summary II



Q7. Below are a range of actions known to lower our environmental impact and help tackle the climate crisis. Please select whether you are doing this already if you are open to doing it, or if you are not open to doing it at all. (Base: all adults aged 18+)

# Men are especially resistant to climate friendly behaviours



Meanwhile, when it comes to reducing one's impact by flying less, those who are more well off are less likely to be doing this, while men are especially less likely to regularly eat plant-based products and limit meat.

## Actions currently doing (Excluding N/A)



Gender		Age			Social Grade		Region			
Male	Female	18-34	35-54	55+	ABC1	C2DE	Dublin	ROL	Munster	Conn/ Ulster
		Red		Green						
Red	Green	Red		Green						
	Green			Green						
		Red		Green						
Red										
Red	Green									
							Green			
Red										
	Green									
Red						Red X				
Red X	Green									

Q7. Below are a range of actions known to lower our environmental impact and help tackle the climate crisis. Please select whether you are doing this already if you are open to doing it, or if you are not open to doing it at all. (Base: all adults aged 18+)

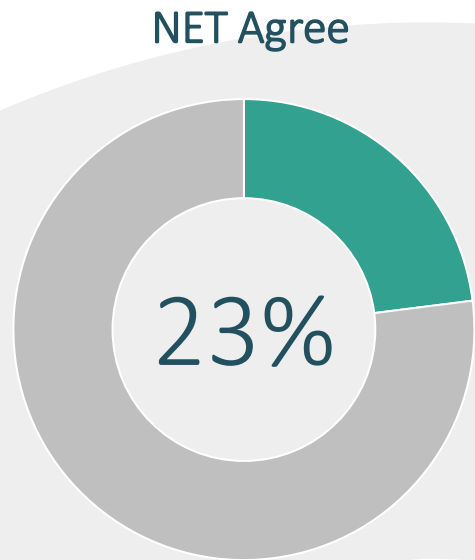
# The appeal of foreign holidays and sunny weather is strong



We see low level of intention to holiday in Ireland instead of travelling abroad, which suggests strong likelihood of high level of flying away on holidays this year and larger carbon footprint from travel.

I will be holidaying in Ireland instead of abroad this year

NET Agree  
 Strongly Agree  
 Somewhat Agree



Total	Gender		Age			Dependent Children		Social Grade		Region			
	Male	Female	NET: 18-34	NET: 35-54	NET: 55+	None	Any	NET: ABC1	NET: C2DE	Dublin	ROL	Munster	Conn/ Ulster
23%	21%	25%	23%	21%	25%	23%	24%	21%	23%	24%	25%	22%	20%
13%	11%	15%	14%	11%	13%	14%	11%	13%	13%	15%	14%	12%	8%
10%	10%	10%	9%	10%	12%	9%	13%	8%	10%	9%	11%	10%	11%

○ Significantly higher/lower than national average

(Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?)

(Base: all adults aged 18+)



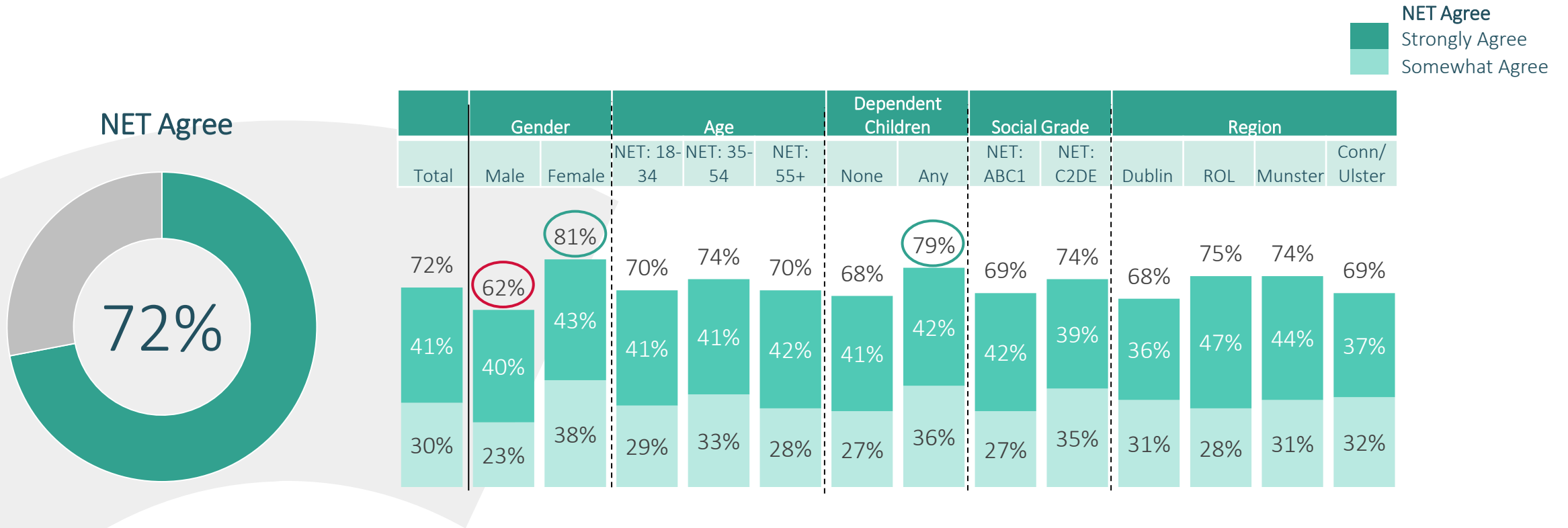
Cost of living crisis is having a significant impact on consumers' purchasing ability with regard to sustainable products and services

# For majority, rising energy bills means cuts in spending elsewhere



This is especially prevalent amongst women (81%) and those with any dependent children (79%).

I am cutting back on my spending as a direct result of rising energy bills



○ Significantly higher/lower than national average

(Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?)

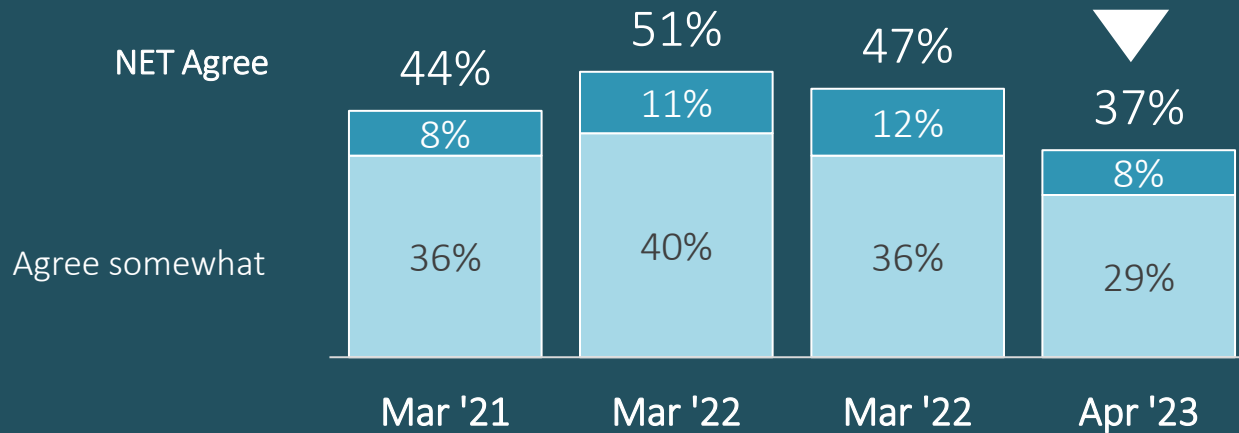
(Base: all adults aged 18+)



# Continued decline in those seeking out sustainably-minded brands

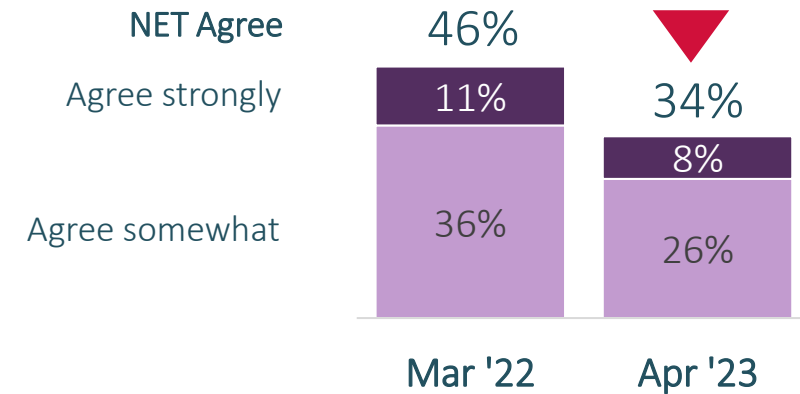
Decline in those seeking out sustainably-minded brands strongly suggests consumers are seeking out value rather than sustainability credentials.

I specifically seek out products that are sustainably sourced/produced



Agreement highest: 18-34s (45%) & lowest: 35-54s (30%) Also high among women, especially women without kids (46%).  
Decline most evident among 35-54s and in Dublin

I actively look for brands that explain the steps they take to offer more sustainable products and services



Agreement highest: 18-34 year olds (45%) & ABC1s (37%)  
Decline on Mar '22 evident across all demographics

▲▼ Indicates significant difference vs. Sep '22

Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

(Base: all adults aged 18+)

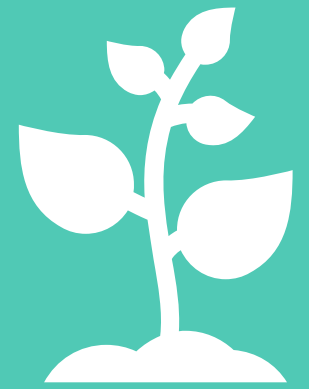
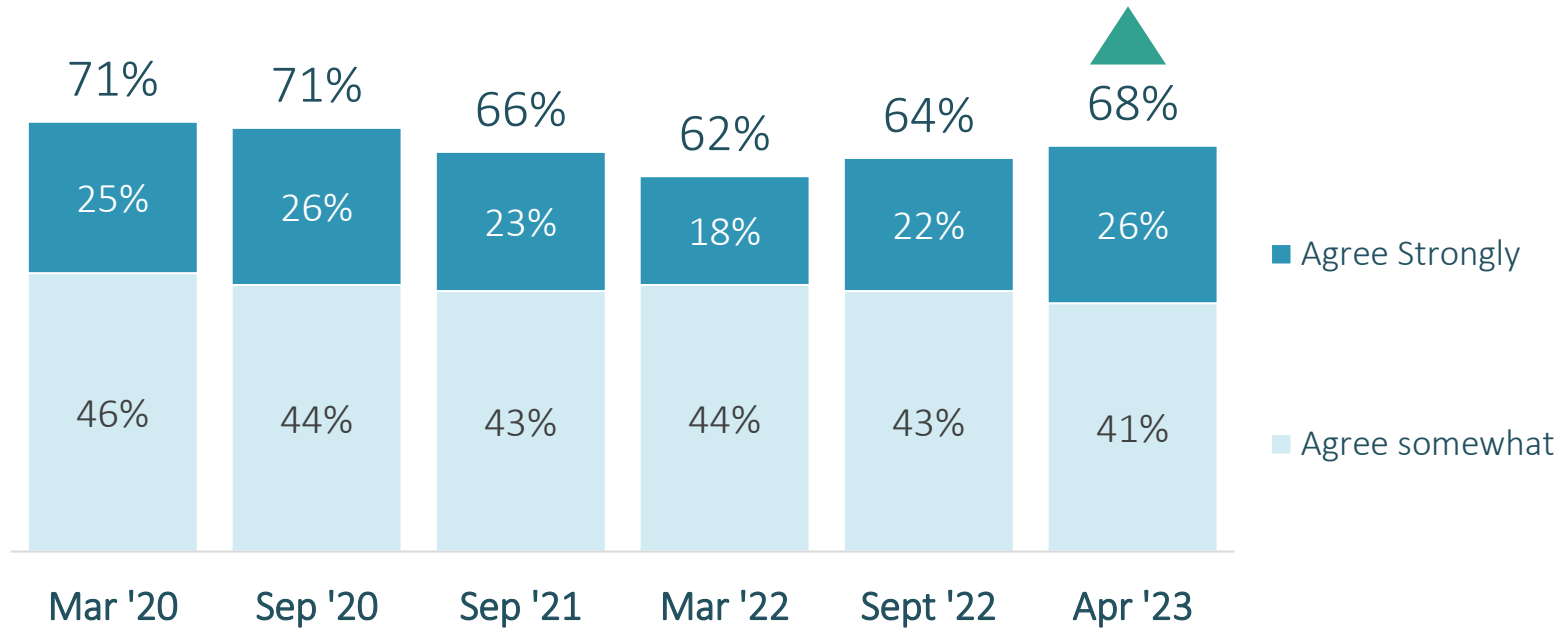


However, there is an underlying feeling of hope that there is still time left, with a strong desire to see brands lead the way mainly through affordability on sustainable products

# There is still a feeling that there is time left to reverse the effects of climate change



There is still time left for us to reverse the effects of climate change



Increase on September greatest among over 55s; lower social grades; and in Connaught/Ulster  
 Overall highest among over 55s; and lowest among under 34s

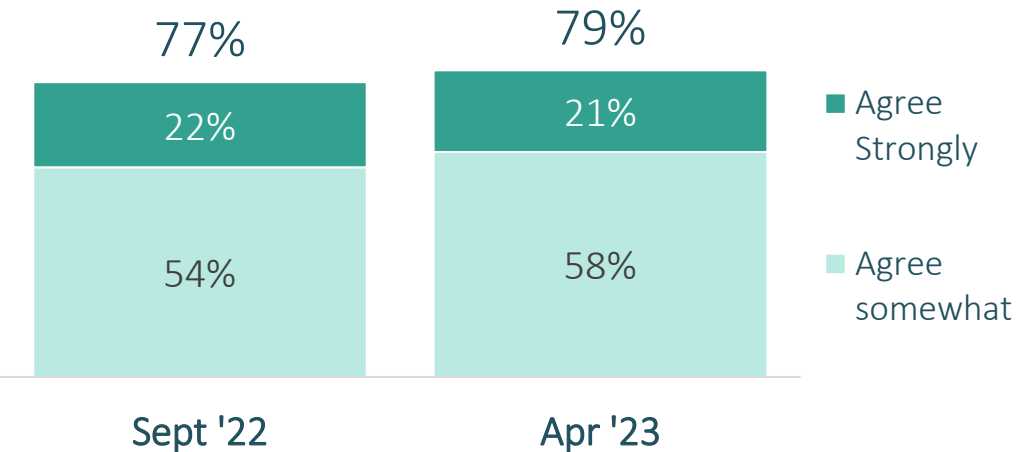
▲ ▼ Indicates significant difference vs. Sept '22

Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

(Base: all adults aged 18+)

# Confidence is lacking somewhat in what it means to live more sustainably

I have a good understanding of what it means to live more sustainably



Higher social grades claim to have an especially good understanding of what it means to live sustainably.

▲ ▼ Indicates significant difference vs. Sept '22

Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

(Base: all adults aged 18+)

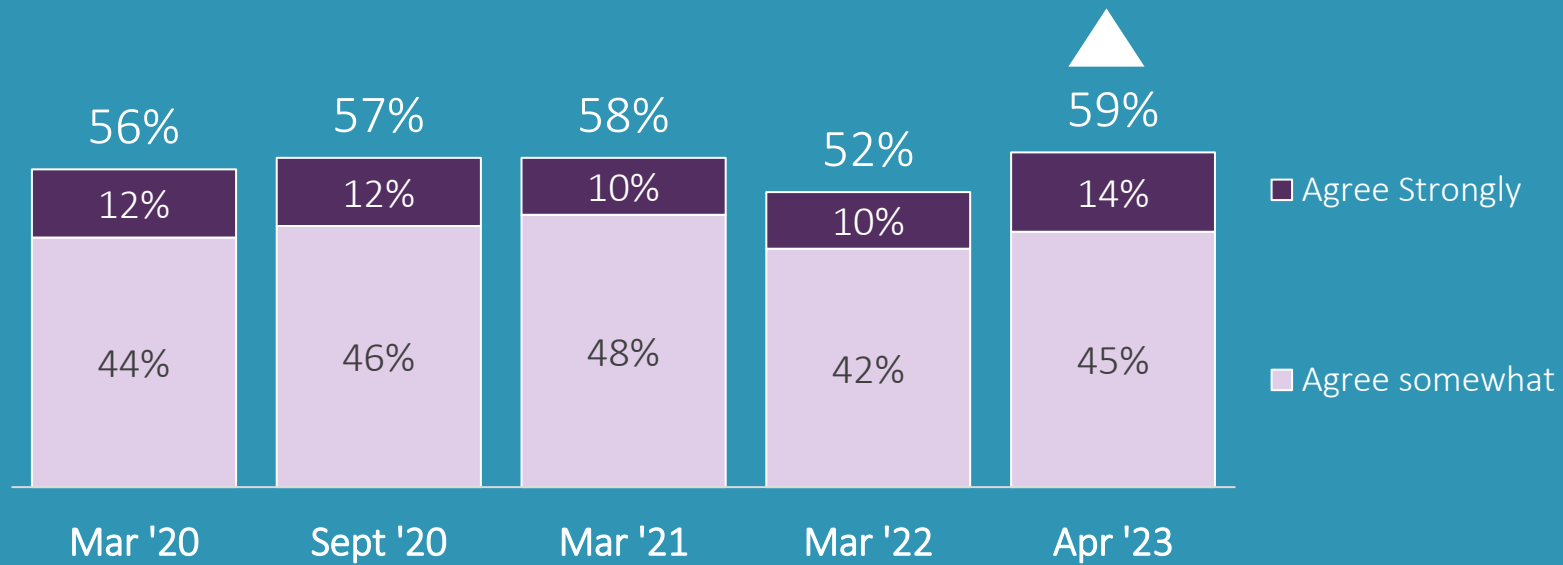




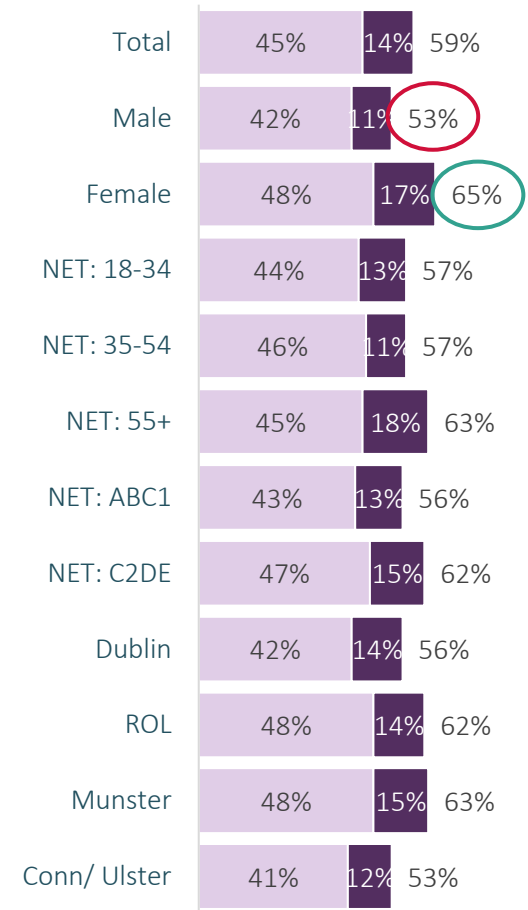
# There is still a sizable proportion of the population that would like to live sustainably, but is just not sure how to do this

Strong evidence that women would be more receptive to sustainability messaging trying to help inform those who would like to live more sustainably.

I would like to live more sustainably, but I'm not sure how



Apr '23



○ Significantly higher/lower than national average

Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

(Base: all adults aged 18+)

▲ ▼ Indicates significant difference vs. Sept '22

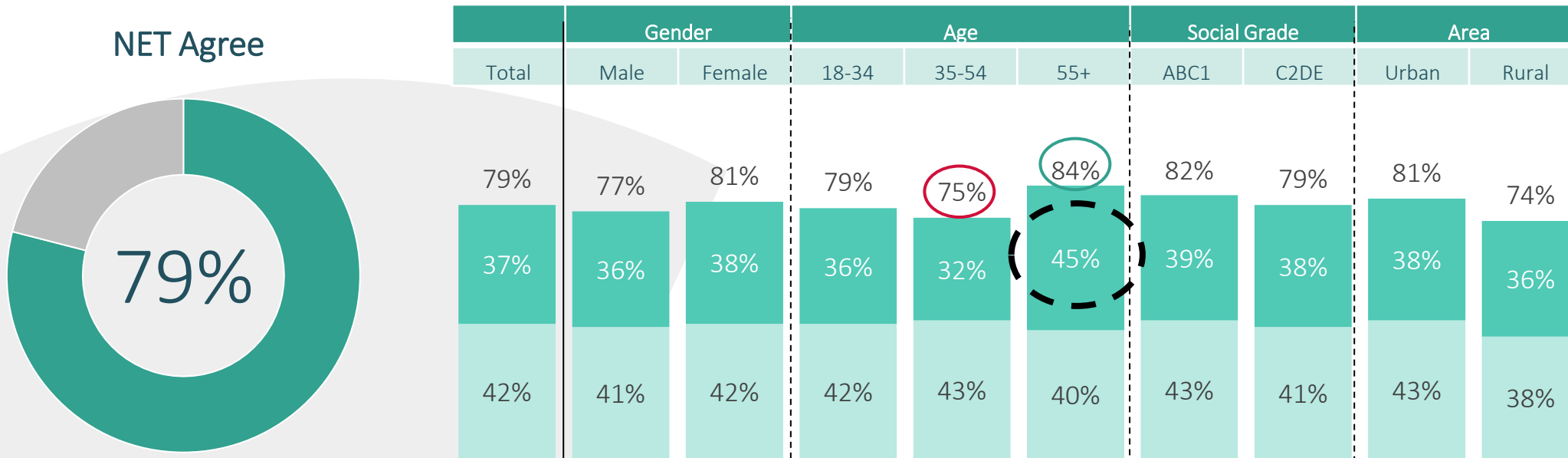
# Very strong expectation that brands need to lead the way



This feeling is especially prevalent amongst older ages, with nearly half agreeing very strongly that brands need to lead the way on helping them be more sustainable.

I expect brands to lead on helping me be more sustainable

NET Agree  
Strongly Agree  
Somewhat Agree



○ Significantly higher/lower than national average

(Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?)

(Base: all adults aged 18+)

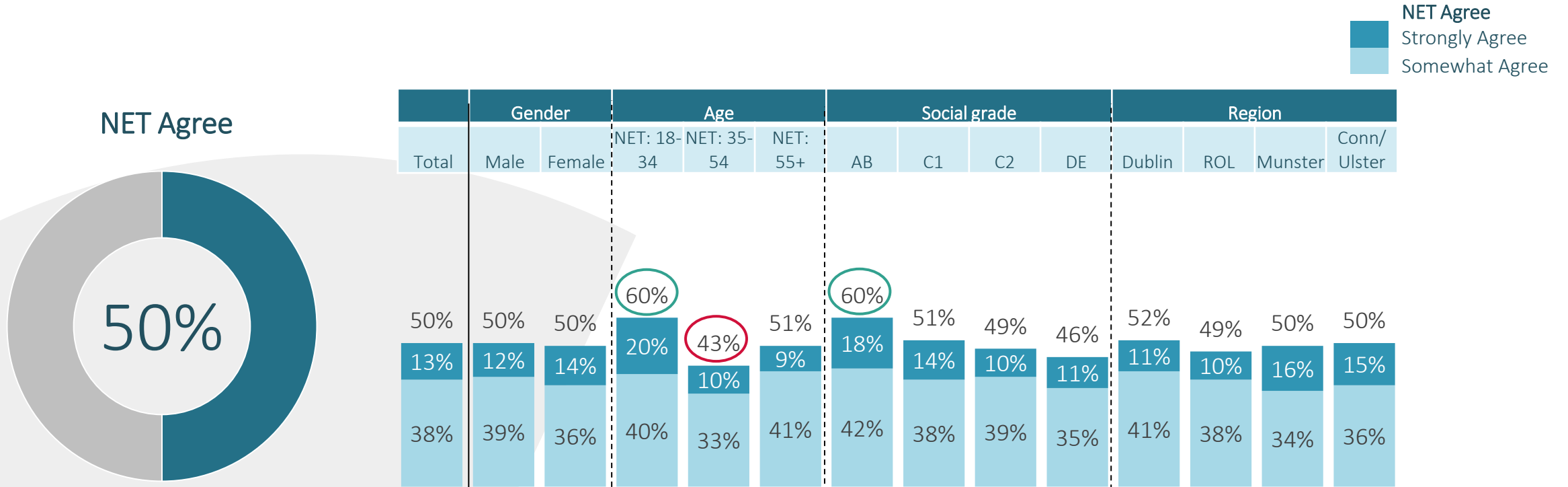


# Product switching behaviour noted if sustainability concerns exist



Half of adults claim to have done this, with this reported switching behaviour especially prevalent amongst 18-34-year-olds and AB social grades. Family age 35-54-year-olds are less likely to take action on this.

I have switched products or brands due to sustainability concerns



○ Significantly higher/lower than national average

(Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?)

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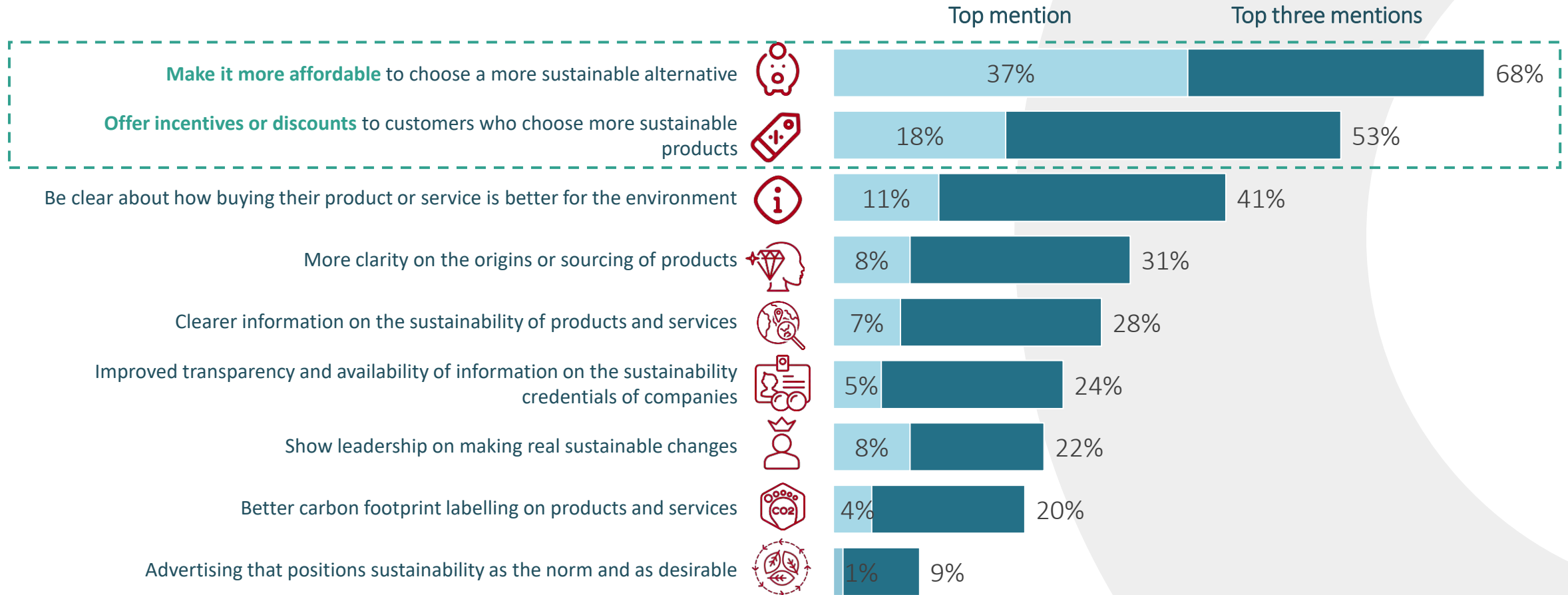
Consumers crave more  
affordability to help them live  
more sustainably during the cost  
of living crisis, as well for brands  
to be more informed

# Affordability & discounts are top sustainability asks



With the cost-of-living crisis taking centre-stage, most consumers would like to see more affordable ways to choose sustainable options and for brands to offer incentives or discounts.

## Services, incentives and information wanted from brands to help make sustainable choices



Q. What do you want from brands and service companies to help you make more sustainable choices?

(Base: all adults aged 18+)



# Women in particular would like to see more affordable options



Women (73%) are more likely to wish to see more affordable ways to choose sustainable alternatives, while 18-34-year-olds are more likely than other groups to crave brand leadership and ad positioning of sustainability.

## Services, incentives and information wanted from brands to help make sustainable choices – Top three mentions

Make it more affordable to choose a more sustainable alternative **68%**

Offer incentives or discounts to customers who choose more sustainable products **53%**

Be clear about how buying their product or service is better for the environment **41%**

More clarity on the origins or sourcing of products **31%**

Clearer information on the sustainability of products and services **28%**

Improved transparency/availability of info on sustainability credentials of companies **24%**

Show leadership on making real sustainable changes **22%**

Better carbon footprint labelling on products and services **20%**

Advertising that positions sustainability as the norm and as desirable **9%**

Gender		Age			Social Grade		Region			
Male	Female	18-34	35-54	55+	ABC1	C2DE	Dublin	ROL	Munster	Conn/ Ulster
	Green									
				Green						
		Green								
		Green		Red				Red	Green	

Q5. Below is a range of actions cited by the United Nations as ways to lower our environmental impact and help tackle the climate crisis. Please tell us to what extent you agree or disagree with each of the below statements.

(Base: all adults aged 18+)

# Consumers increasingly expect brands to provide 'environmental impact' information on their products and services

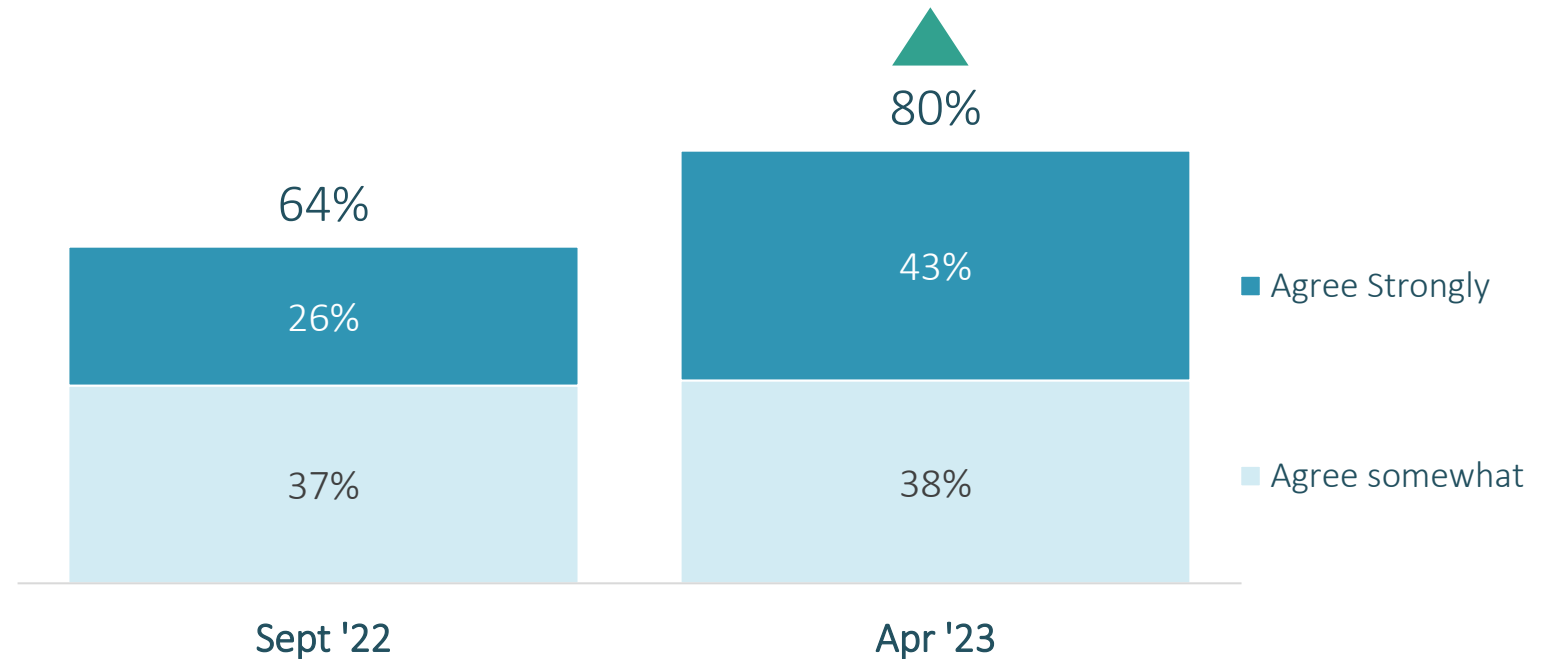


▲ ▼ Indicates significant difference vs. Sept '22

Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

(Base: all adults aged 18+)

There should be a requirement for products and services to display the environmental impact of their production and consumption on their labelling



Increase in support for more environmental information on labels is especially driven by men aged 55+, although higher support is seen to some degree across nearly all demographic groups



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