



UK Consumer Sustainability

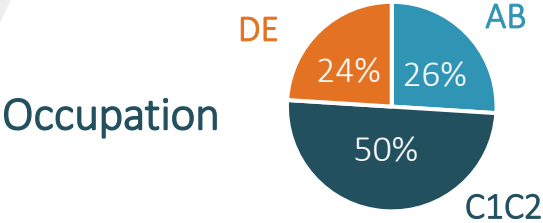
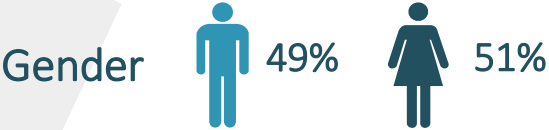
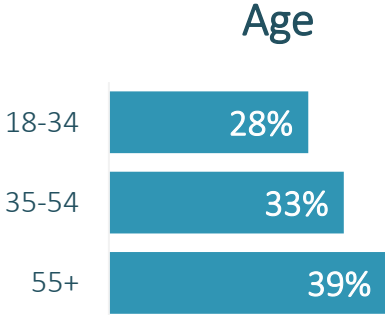
October 2023
REDC



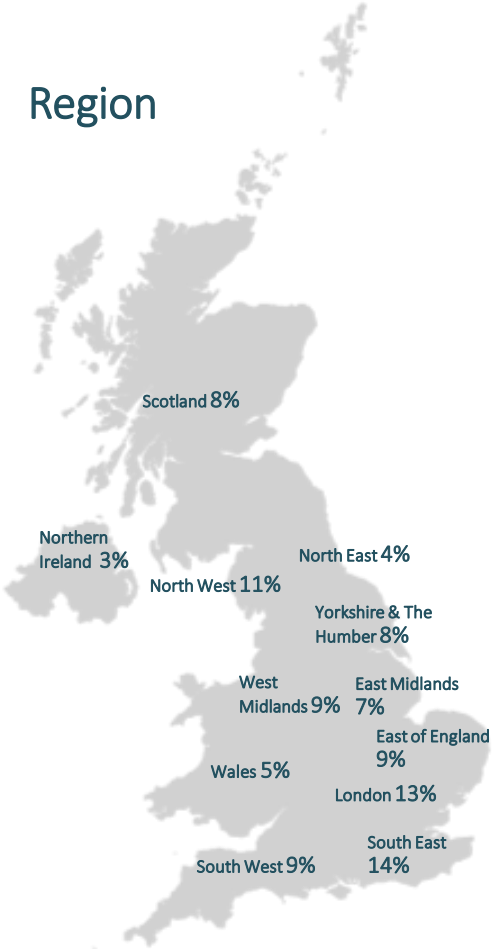
Sample and methodology



- Online Survey among a Nat Rep Sample of N=2074UK Adults
- Fieldwork conducted: 20th-21st September



Region





1

Summary

RED C Sustainability Tracker Wave 7 – Key Headlines



1 in 2 report feeling **environmental problems have a direct effect on their lives today**, a score up significantly WoW and likely a result of extreme weather conditions at the time of fieldwork. As a result, the UK is slightly more engaged in eco behaviours than the ROI.



There is evidence of **hopelessness among 18-34s** about macro environmental issues, with significantly fewer now feeling their personal actions can improve the environment. In contrast, **those 55+ have acquired more sustainable behaviours**, ranking top for a plethora of green behaviours including buying local, in season food and buying fewer products containing palm oil.



The **economic gap** seen previously between **ABs** and **C2DEs** has closed as ABs are now feeling more financial pressure and have become just as likely as C2DEs to say they **cannot financially afford to live more sustainably**.



Honest sustainable brand messaging is key, as 1 in 2 people in the UK say they would strongly consider **switching brands if they suspected them of greenwashing**.



Just over 1 in 10 people in the UK believe the UK is on pace to reach its 2030 net zero emissions reduction **targets (14%)**, likely due to recent governmental announcements of delays to key climate targets. The confidence level is similarly low in ROI.



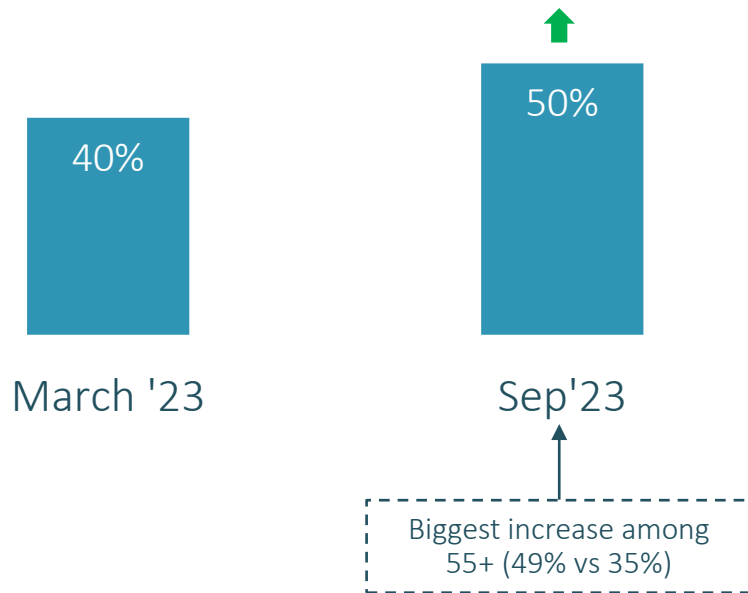
2

Sustainable Attitudes

Significantly more report feeling that environmental problems have a direct effect on their lives today

T2B Agree – Total Sample

'Environmental problems have a direct effect on my life today'



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?/ Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each. / Base: Total Sample March '23 n=2092, September '23 n=2074



Significant increase/decrease vs 6 March '23

This feeling is likely a result of the extreme weather conditions that took place as the fieldwork was being conducted



Warmest September on record as 'gobsmacking' data shocks scientists

🕒 4 days ago · 💬 Comments

Met Office warns parts of UK could see half a month's rain in an hour

WEATHER | RAIN | THUNDERSTORMS | 🕒 Sunday 17 September 2023 at 1:33pm

UK weather: Thunder and rain likely to washout weekend before autumn arrives

Humid air moving northwards to bring thunderstorms over weekend

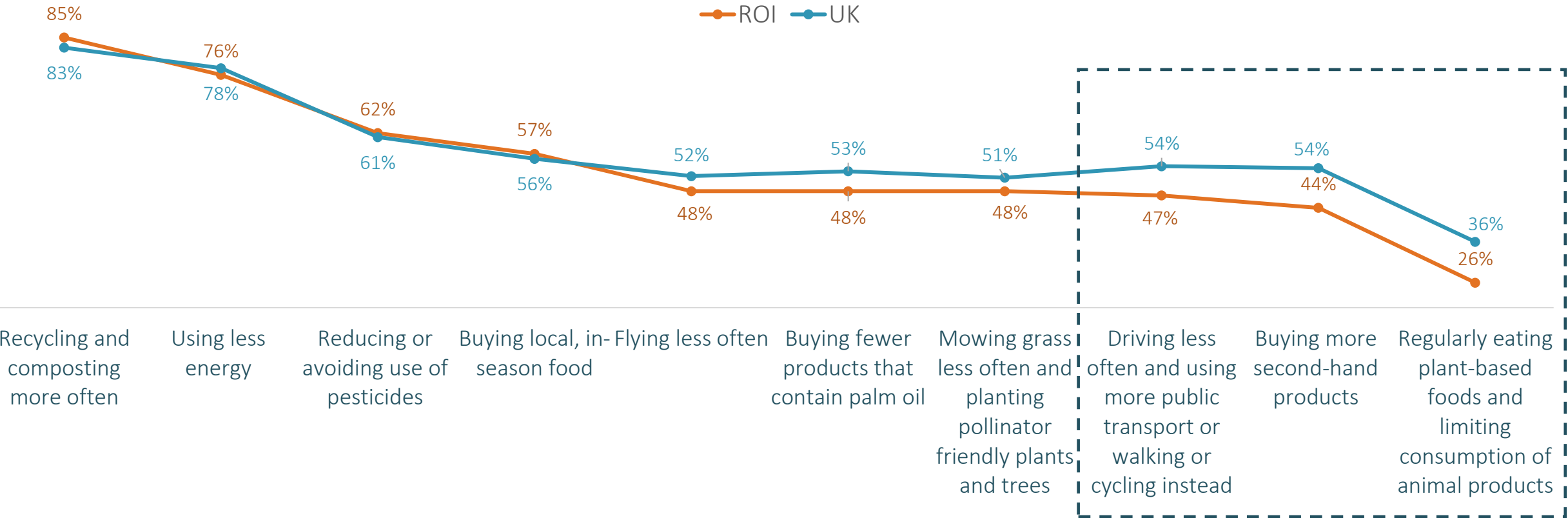
Wildfires spark holiday chaos as Italian airport shut and Brits rescued from Rhodes

UK residents more likely to be engaging in various eco behaviours



ROI and UK residents are roughly on par for most behaviours, but the gap widens with UK residents more likely to be driving less often; to be buying more second-hand products; and to regularly eat plant-based foods.

Currently doing this (excluding not applicable) – Total sample



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+)

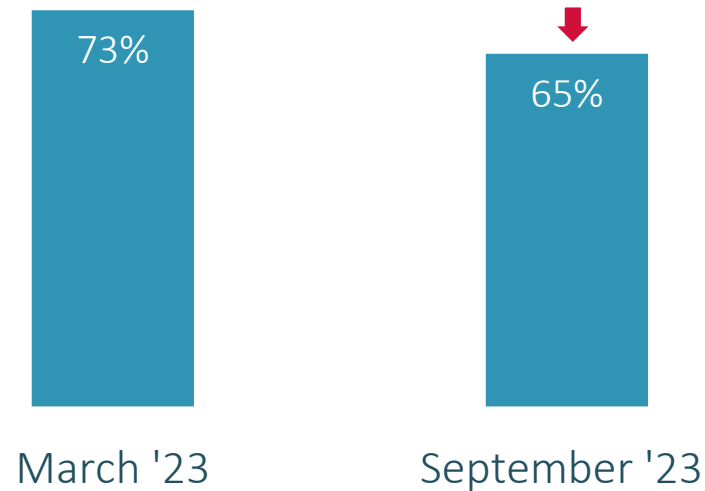


Despite previously being the cohort most likely to adopt sustainable behaviours, there is evidence of **hopelessness about macro environmental issues among 18-34s**

18-34s are less likely than in March to feel that their personal actions can improve the environment

T2B Agree – 18-34s


'I believe my personal actions can improve the environment'



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?/ Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each. / Base: 18-34's March'23 (n=551), September '23 (n=577)



Almost 4 in 10 18-34s report trying **not to think** about the **climate crisis** because of how **depressing** it is (37%)*

*  35-54 (31%) & 55+ (22%)

Feelings of despair & hopelessness about the climate crisis are permeating through young Brits



‘Terrified for my future’: climate crisis takes heavy toll on young people’s mental health

Young people in the UK tell how the emergency is affecting their psychological wellbeing and how they are coping

One in three young people in Britain are scared (33%), sad (34%) or pessimistic (34%) about climate change, with 28% feeling “overwhelmed”, according to a YouGov poll.



3

Resurgence of
over 55s



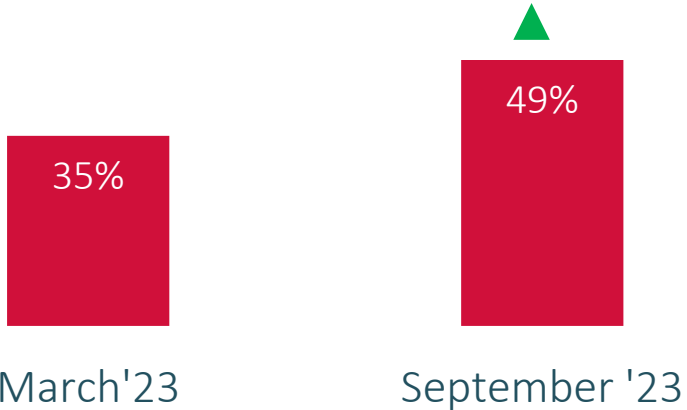


Encouragingly however, this wave **we see 55+’s adopting more sustainable behaviours**, having previously been a group less engaged with sustainability

WoW, those 55+ are significantly more likely to feel the effects of environmental problems & specifically seek out sustainable products

T2B Agree – 55+ - WoW

'Environmental problems have a direct effect on my life today'



'I specifically seek out products that are sustainably sourced/produced'



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?/ Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each. / Base: All 55+ March 23 n=836, September 2023 n=808

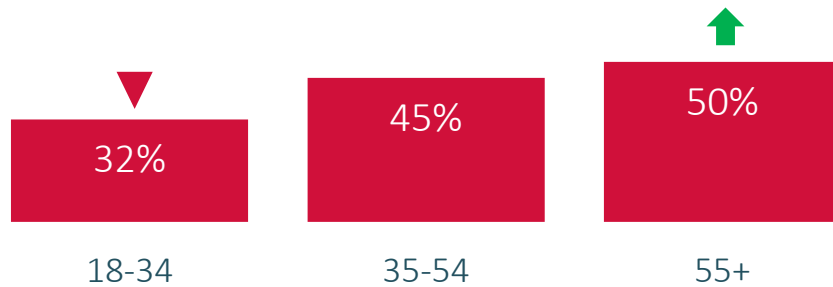
▲ ▼ Significant increase/decrease vs March'23 @95%

55+s are also most likely to buy fewer products containing palm oil and buy local, in-season food; scores up WoW

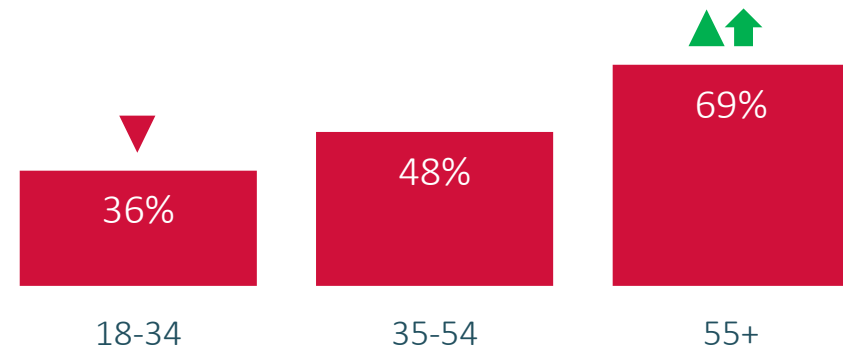
% Already doing it – 55+



'Buying fewer products that contain palm oil'



'Buying local, in-season food (e.g., fruit and vegetables that are in-season and grown locally)'



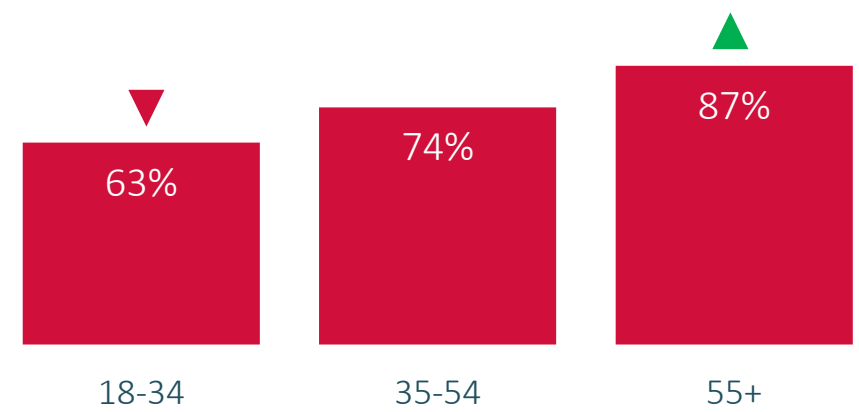
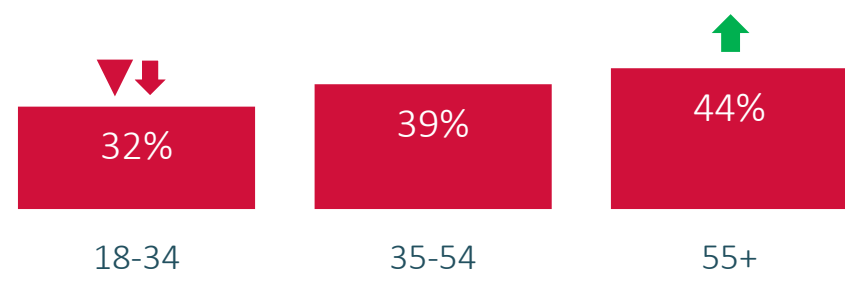
Q.7 Below are a range of actions known to lower our environmental impact and help tackle the climate crisis. Please select whether you are doing this already, if you are open to doing it, or if you are not open to doing it at all Base: Total Sample September '23 n=2074, 18-34 n=577, 35-54 n=689, 55+ n=808

↑↓ Significant increase/decrease vs. previous wave
▲▼ Significantly up/down vs other groups @95%

Those 55+ are the age group most likely to report flying less often and using less energy to tackle the climate crisis



% Already doing it – 55+



Q.7 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: Total Sample September '23 n=2074, n=1057, 18-34 n=577, 35-54 n=689, 55+ n=808

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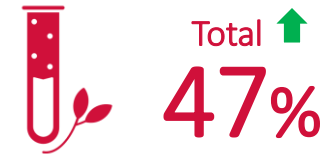
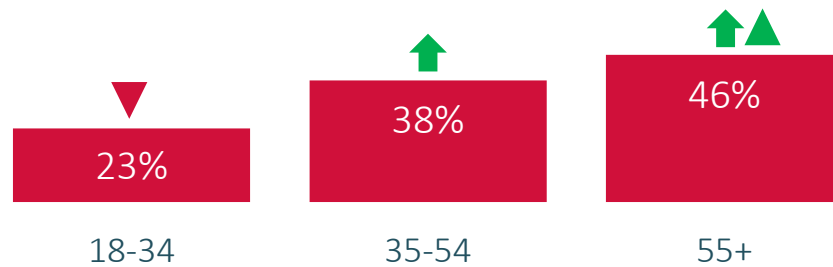
When it comes to gardening, 55+s are driving green behaviours such as mowing the grass less often and reducing use of pesticides



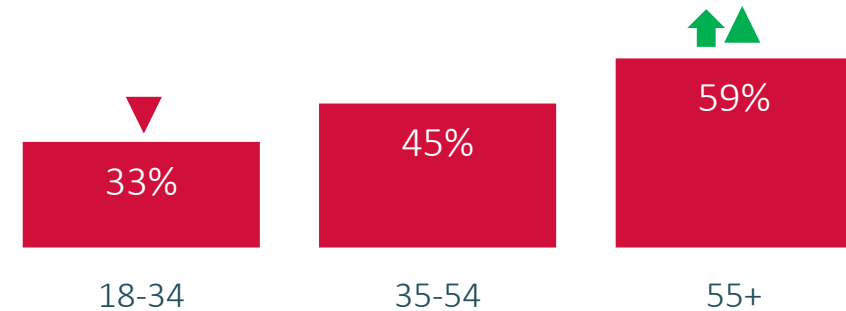
% Already doing it - 55+



'Mowing grass less often and planting pollinator friendly plants and trees'



'Reducing or avoiding use of pesticides (chemicals used for killing pests such as insects, rodents, fungi, and weeds)'



Q.7 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: Total Sample September '23 n=2074, n=1057, 18-34 n=577, 35-54 n=689, 55+ n=808

Significant increase/decrease vs. previous wave
 Significantly up/down vs other groups @95%



4

Sustainable shopping

Women, 18-34s and ABs continue to be most likely to seek out sustainable products

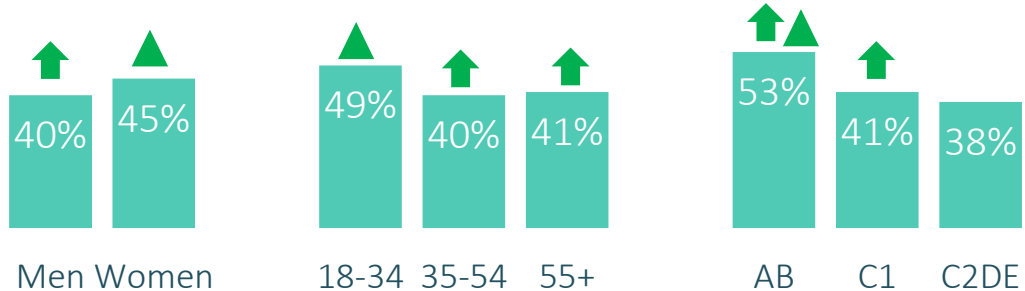


They are also more likely to purchase fewer products than they did a year ago to live more sustainably

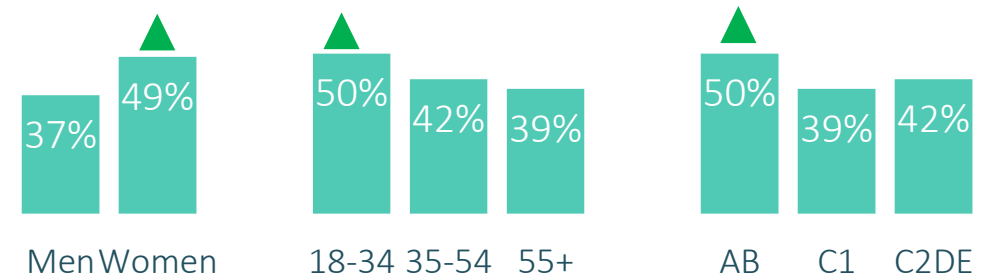
% Already doing it



‘I specifically seek out products that are sustainably sourced / produced’



‘I currently am purchasing fewer products than I was a year ago in order to live more sustainably’*



**new question added this wave*

Significant increase/decrease vs. previous wave
 Significantly up/down vs other groups @95%

Q.7 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: Total Sample September '23 n=2074, Men n= 1012, Women n=1057, 18-34 n=577, 35-54 n=689, 55+ n=808, AB =474, C1 =634, C2DE n=966

The **economic gap** seen previously between **ABs** and **C2DEs** has closed as **ABs** now feel **less financially secure** to make sustainable changes to their lives

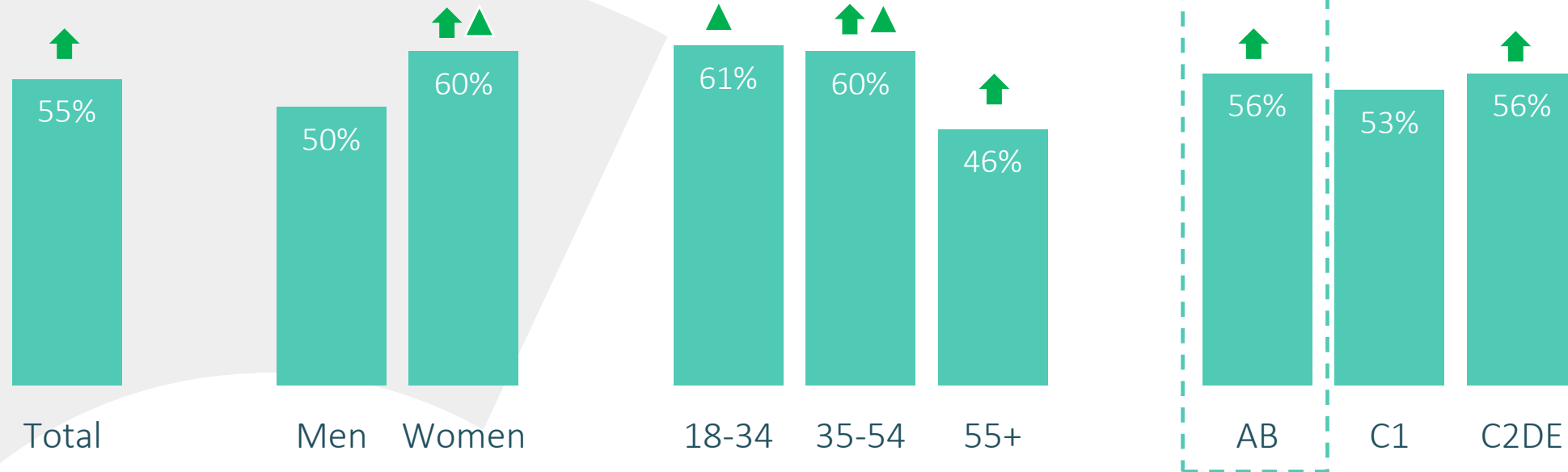
ABs now report being just as likely as C2DEs to say they cannot financially afford to live more sustainably



Financial pressure is also being felt across age groups– not just those under 35 as previously seen

T2B Agree – By subgroups

*‘I would like to live more sustainably,
but I cannot financially afford to make the changes needed to do so’*



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample September '23 n=2074, Men n= 1012, Women n=1057, 18-34 n=577, 35-54 n=689, 55+ n=808,ABC1 n=1108, C2DE n=966



5

Leveraging sustainability initiatives

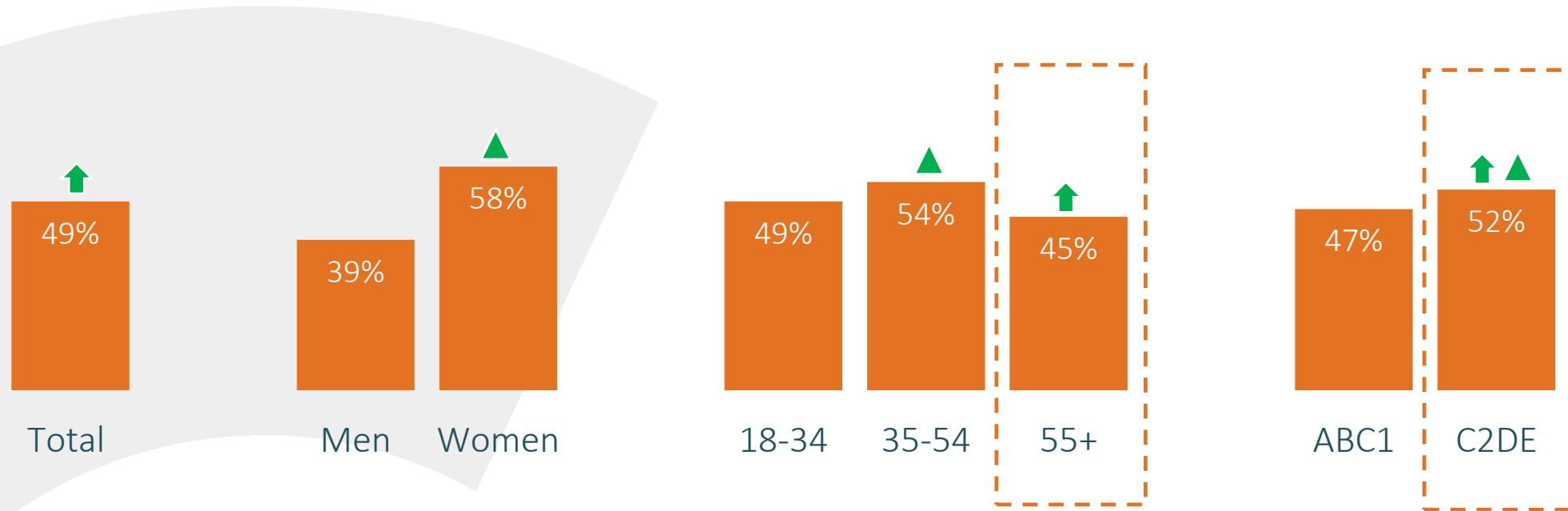
Significantly more 55+ and C2DEs report buying second-hand products



However, Women continue to be the group driving the second-hand market

% Already doing it - By subgroups - WoW

'Buying more second-hand products (e.g., clothing, furniture, electronics)'



Q.7 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: Total Sample September '23 n=2074, Men n= 1012, Women n=1057, 18-34 n=577, 35-54 n=689, 55+ n=808, ABC1 n=1108, C2DE n=966

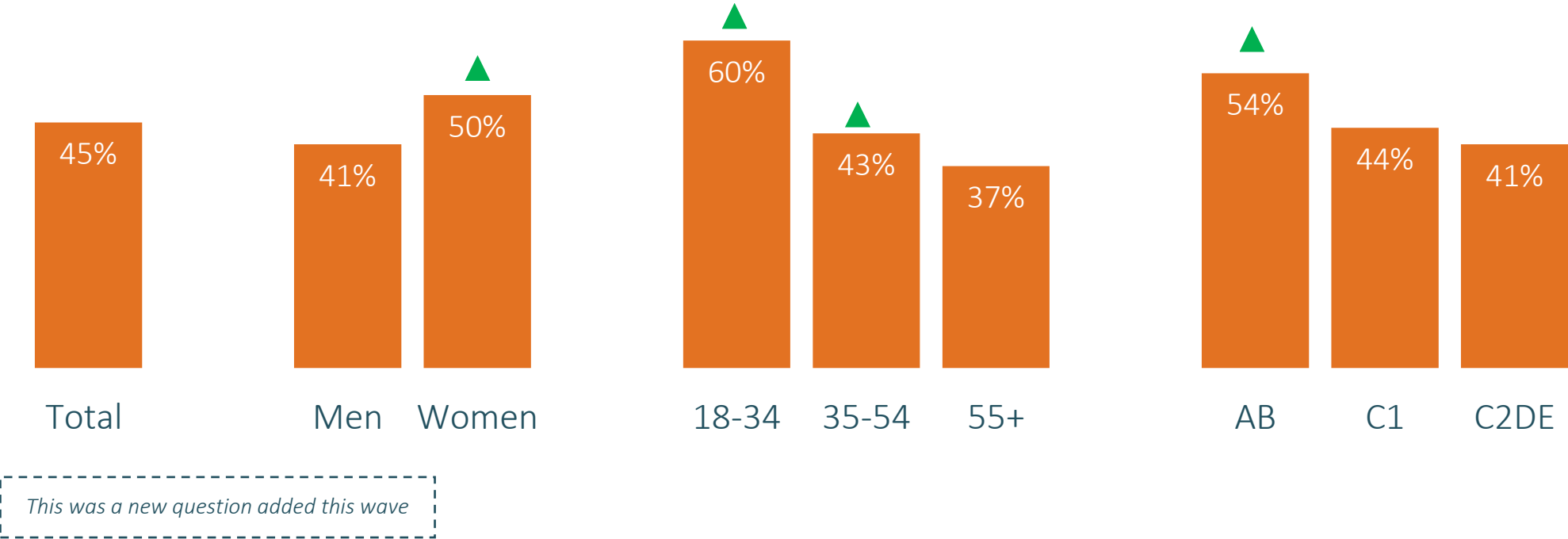
6 in 10 18-34s would like to see influencers promoting sustainable products more



Desire is also high among women and ABs

T2B Agree – by subgroups

'I would like to see influencers promoting sustainable products more'



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample September '23 n=2074, Men n= 1012, Women n=1057, 18-34 n=577, 35-54 n=689, 55+ n=808,ABC1 n=1108, C2DE n=966

▲ ▼ Significantly up/down vs other groups @95%

However, brands need to be genuine as...

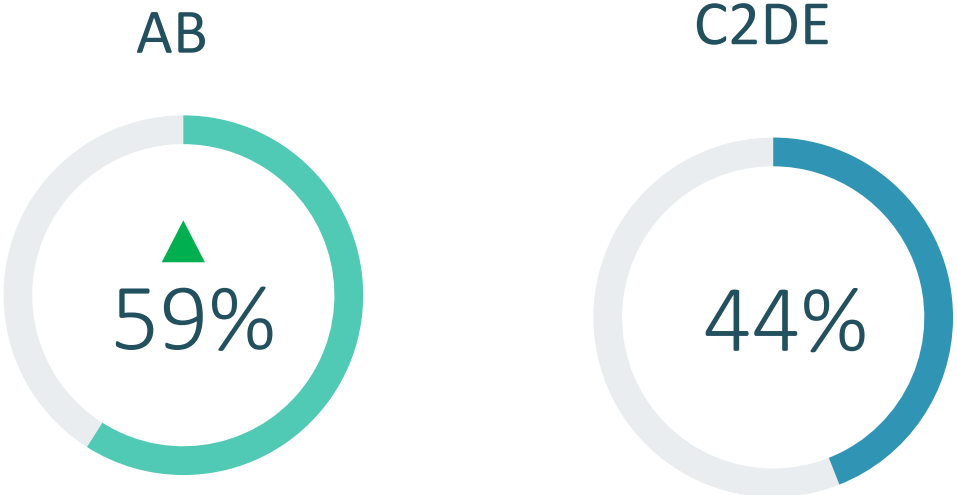
1 in 2 people in the UK agree they would **strongly consider switching brands** if they suspected them of **greenwashing** (49%)

ABs are most likely to consider switching in case of greenwashing

Likely because with affluence and more income comes the ability to choose

T2B Agree – By Subgroups

“I would strongly consider switching brands if I suspected them of greenwashing”



Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment?
Base: AB's September 2023 (n=474), C2DE's September 2023 (n=966) ▲ ▼ Significantly up/down vs. other groups @95%



6

Reaching 'Net zero'



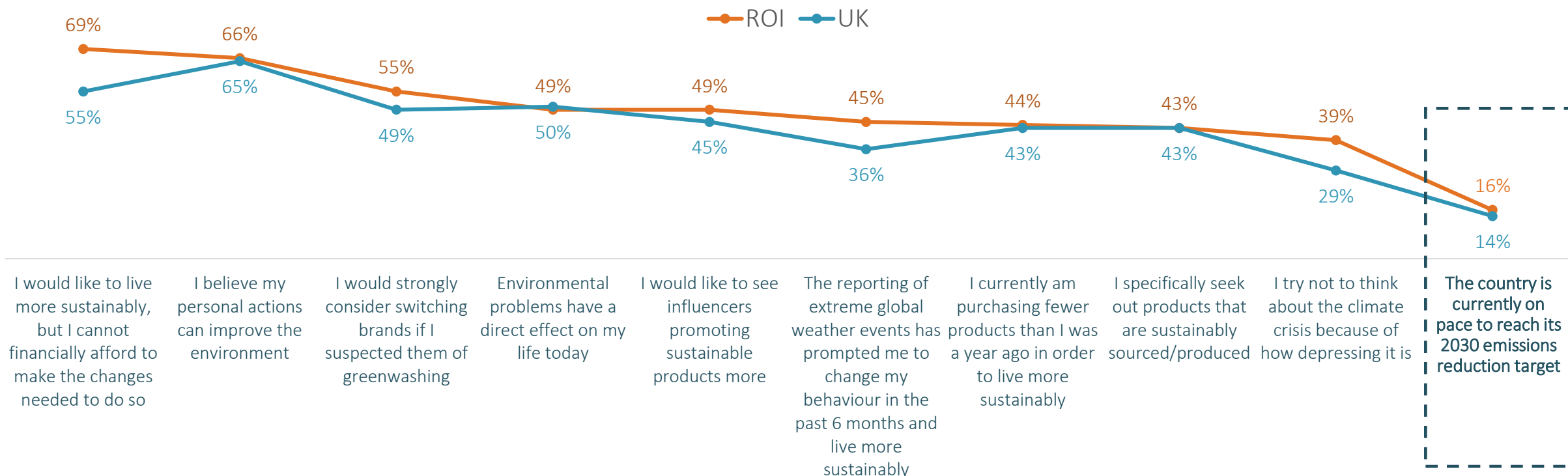


Just over **1 in 10** people in the UK believe the UK is on pace to reach its **2030 net zero** emissions reduction targets (14%)

This low confidence level in reaching the target on time is also observed in ROI



T2B Agree – Total sample UK vs ROI



(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+)

At the time of fieldwork, the UK Prime minister outlined delays to some key climate targets



New cars with **combustion engines** were due to be banned from sale in 2030 but have now been **pushed back to 2035**.



The **2026 ban on off-grid boilers** in favor of heat pumps has also been **delayed to 2035**, with only an 80% phase-out target for this date.



Homeowners and landlords are **no longer required to meet energy efficiency targets**.



THANK YOU

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