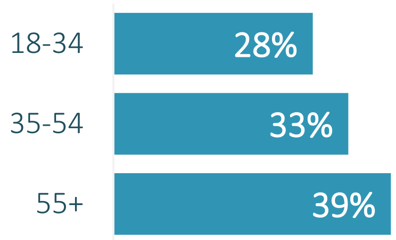
UK Consumer Sustainability

April 2024
RED C

Sample and methodology

- Online Survey among a Nat Rep Sample of N = 2,083
- Fieldwork conducted: 6th-7th March 2024

Age

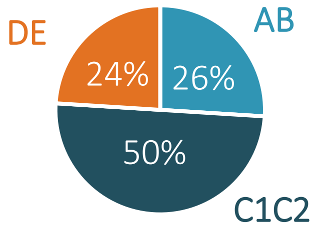


Gender

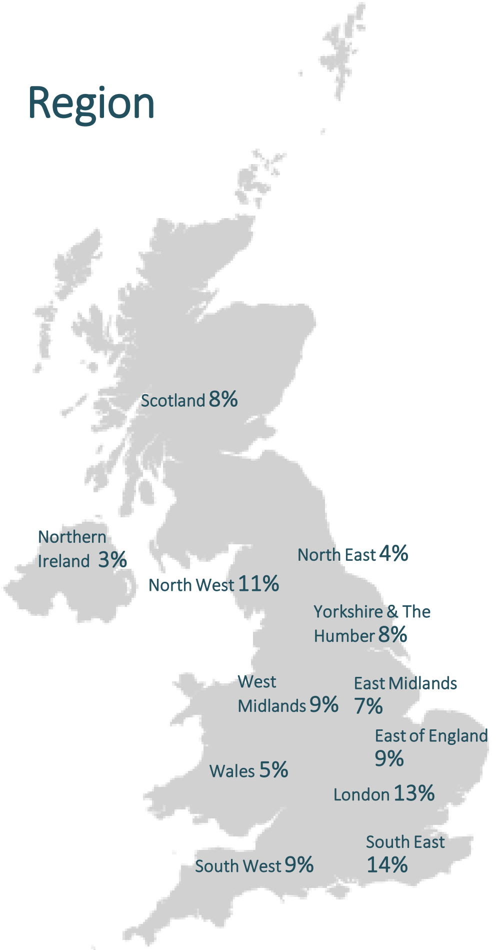
49%

51%

Occupation



Region



1

Summary

Key takeouts | What it means

Key takeouts	What it means
External pressures continue to be a barrier for sustainability: 4 in 10 (41%) "have more pressing things to worry about than the planet right now" and over half want to "live more sustainably but [are not] able to financially afford to make the changes needed to do so (53%)"	Sustainability continues to take a back seat as consumers battle other threats they perceive as more imminent.
Women and 18-34s report sustainability taking the biggest back seat and as a result are seeing the greatest decline in the belief that their personal actions can improve the environment.	Sustainability support and guidance needs to target those most vulnerable to external pressures.
1 in 3 in the UK would like to live more sustainably but are not sure how. People are now turning to brands for the solutions with 6 in 10 agreeing that they expect brands to lead on helping them be sustainable (63%).	Particularly those most vulnerable are willing and want to live more sustainably but it is up to brands to produce the solutions.

Key takeouts	What it means
1 in 3 claimed to have switched products / brands due to sustainability concerns. However, those previously the biggest advocates for sustainability (18-24s & ABs) are now seeing the biggest decline in future switching if they suspected a brand of greenwashing.	With the cost-of-living crisis affecting everyone, we seem more pragmatism in switching brands. Sustainability alone cannot drive sales; a product needs to be fit for purpose and at the right cost before a consumer can consider sustainability. Once this has been achieved, consumers are willing to make sustainable choices.
There has been a significant increase in desire among the UK population for investment into public transport infrastructure verses 2 years ago. In comparison, significantly fewer want to see investment priortised for electric car infrastructure.	Recent rail strikes and rising costs have likely contributed to increased demand for this type of investment. A national increased awareness for the needs for improved bus services are also likely to have played a role.
Twice as many people in the UK now think investment for a sustainable future needs to be directed into upgrading Victorian sewers than they did 2 years ago (18% vs 9%).	2023-24 saw the most named storms in the UK since naming began in 2015. This increased coverage and awareness has brought the inadequacies of the UK sewage system to the fort.

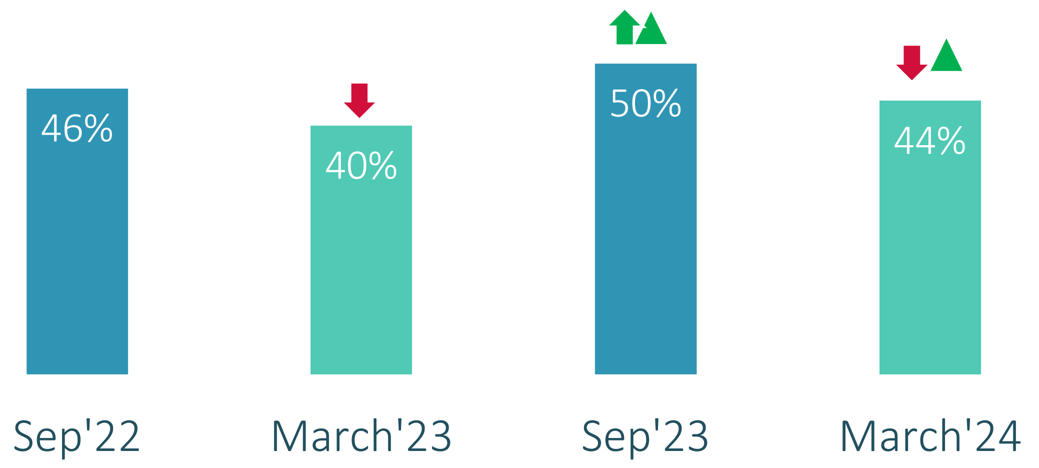
2

Sustainable attitudes

Seasonality at play with fewer feeling environmental problems influence their lives during Spring

T2B Agree – Total Sample - WoW

‘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? Base: Total Sample September 22 n=2078, March 23 n= 2092 September ’23 n=2074, March 2024 =2083

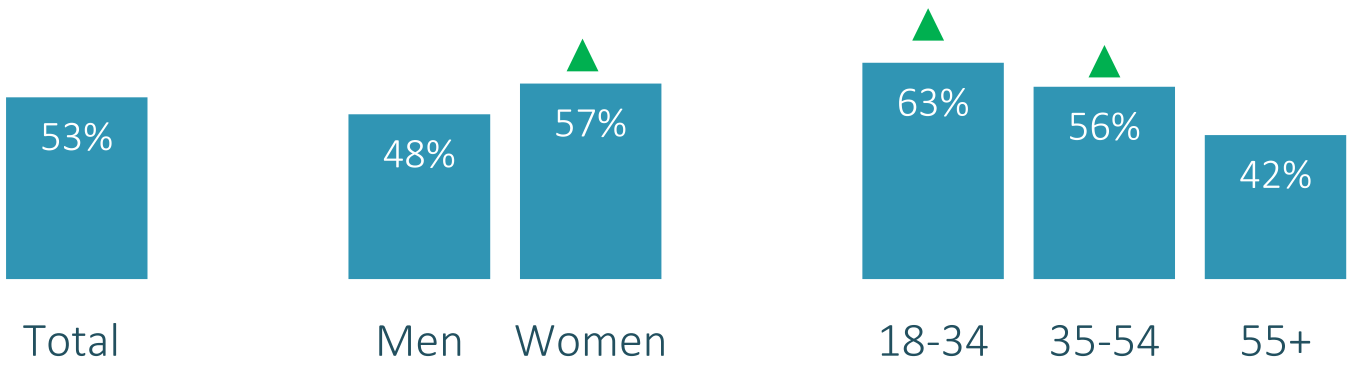
Significant increase/decrease WoW
Significant increase/ decrease YoY

As seen in previous waves, women and 18-34s continue to feel the biggest financial pressures

This is impeding on their efforts to live more sustainably

T2B Agree – By Subgroups – March '24

'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 with regard to your personal views on the environment? Base: Total Sample March 2024 =2,083, Men n= 1069, Women n=1001, 18-34 n=608, 35-54 n=679, 55+ n=796

No significant differences WoW

Significantly higher/lower than other groups @95%

4 in 10 agree that they have more pressing things to worry about than the planet right now (41%)*

* 18-34s (49%)▲ vs 55+ (32%) & Men (45%)▲ vs Women (37%)

Note: new statement added this wave

Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment? Base: Total Sample March 2024 =2083

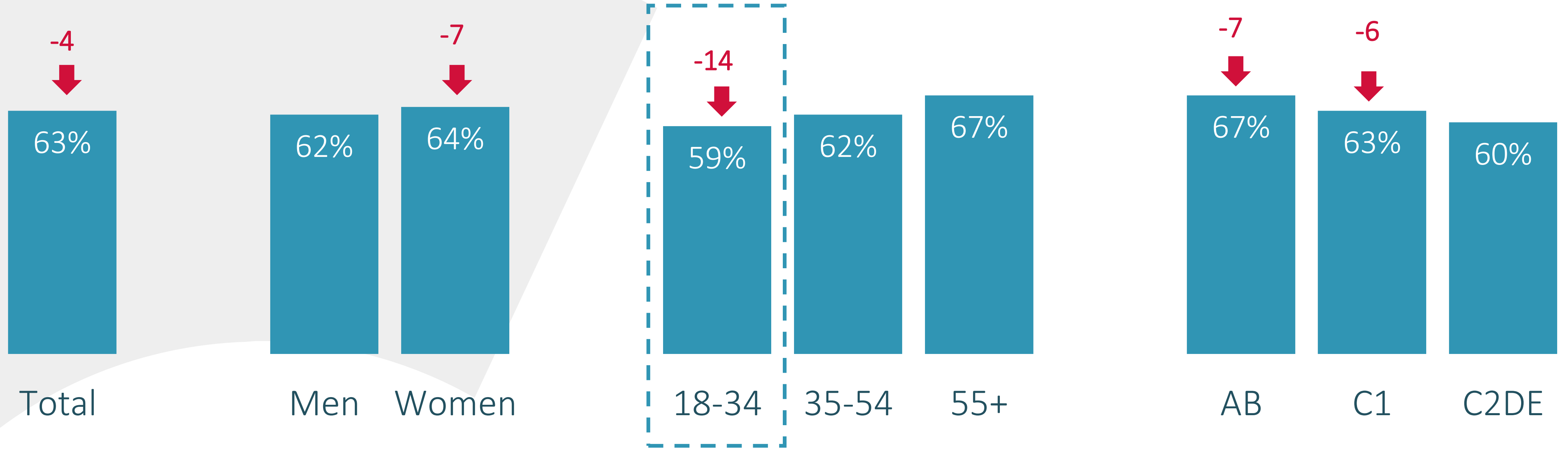
▲▼ Significantly higher/lower than other groups @95%

As a result, 18-34s are seeing the greatest decline in the belief that their personal actions can improve the environment

Women and those at the wealthiest end of the spectrum are also seeing significant declines

T2B Agree – By Subgroups – March'24

'I believe my personal actions can improve the environment'



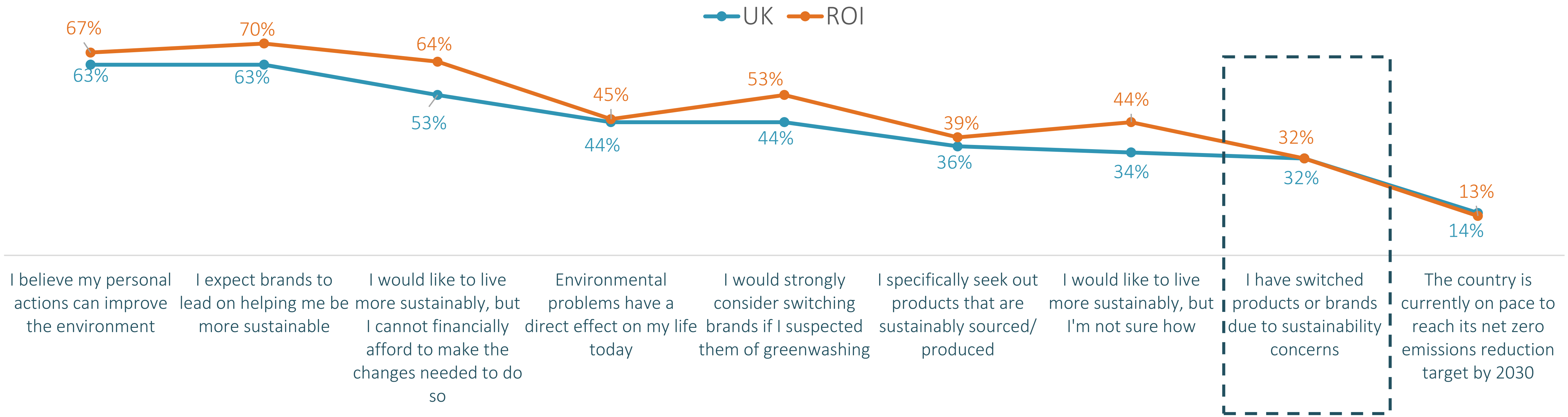
Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample March '24 n=2083, Men n= 1069, Women n=1001, 18-34 n=608, 35-54 n=679, 55+ n=796,AB = 584, C1 = 574, C2DE=925

Significant increase/decrease vs March'23
Significantly higher/lower than other groups @95%

1 in 3 in the UK or ROI have switched products or brands due to sustainability concerns

There remains a low level of confidence in belief the UK / ROI are on pace to reach their 2030 emissions reduction targets

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+)

3

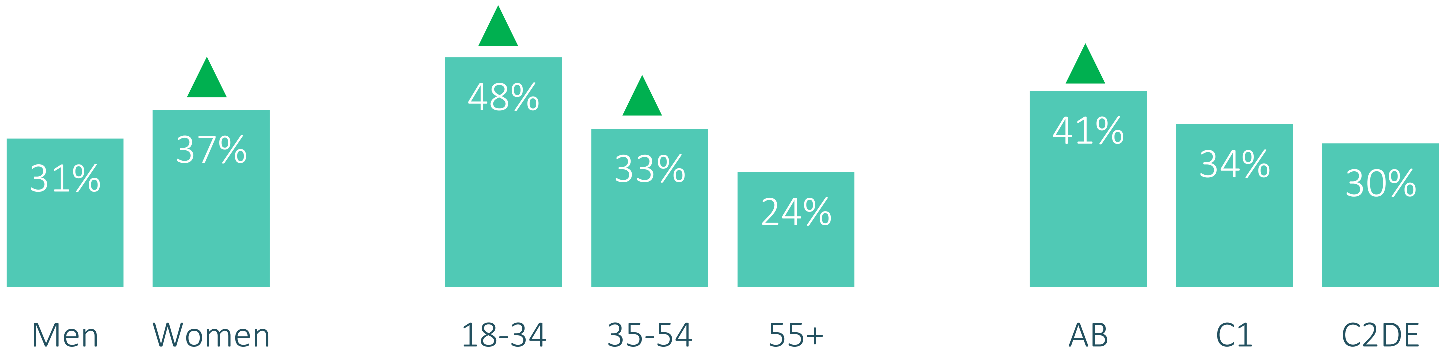
The responsibility for brands to act

1 in 3 would like to live more sustainably, but are not sure how

This is driven by 18-34s, with almost half agreeing with this statement

% Agree – By Subgroups – March '24

Total
34%
'I would like to live more sustainably, but I'm not sure how'*



**new questions added this wave*

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 March '24 n=2083, Men n= 1069, Women n=1001, 18-34 n=608, 35-54 n=679, 55+ n=796,AB = 584, C1 = 574, C2DE=925

▲▽ Significantly higher/lower than other groups @95%

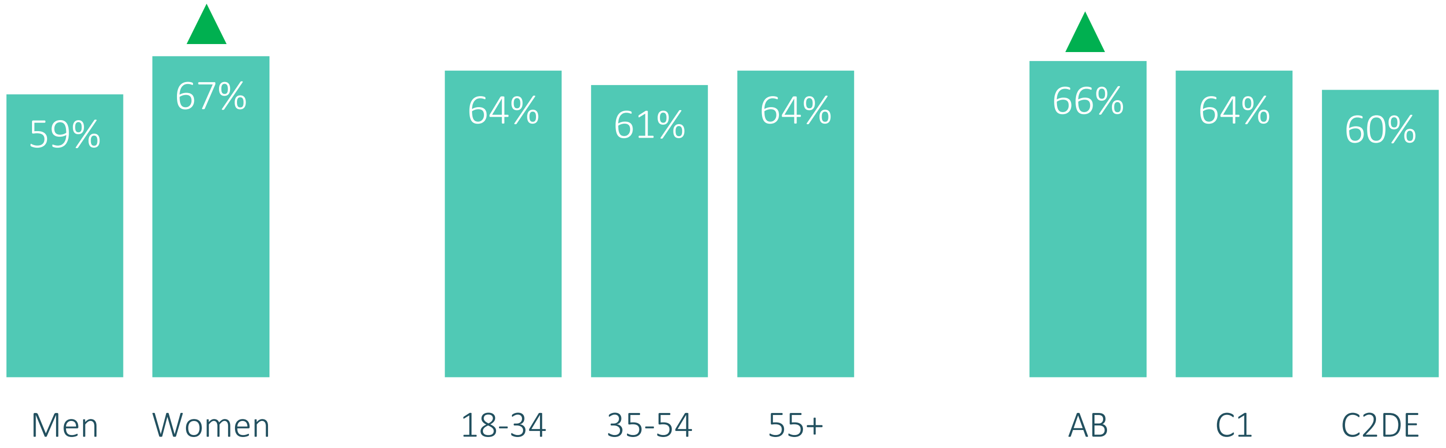
People expect brands to lead on helping them be more sustainable

This is particularly the case for Women and ABs

% Agree – By Subgroups – March ‘24

Total
63%

‘I expect brands to lead on helping me be more sustainable’*



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▲▽ Significantly higher/lower than other groups @95%

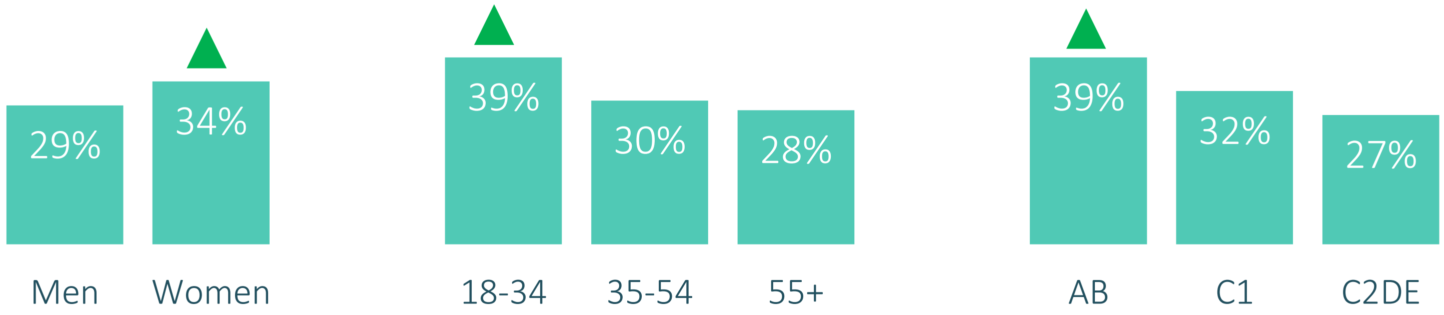
1 in 3 in the UK claim to have switched products / brands due to sustainability concerns

18-34s and ABs are most likely to have done this

% Agree – By Subgroups – March '24

Total
32%

'I have switched products or brands due to sustainability concerns'



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▲▽ Significantly higher/lower than other groups @95%

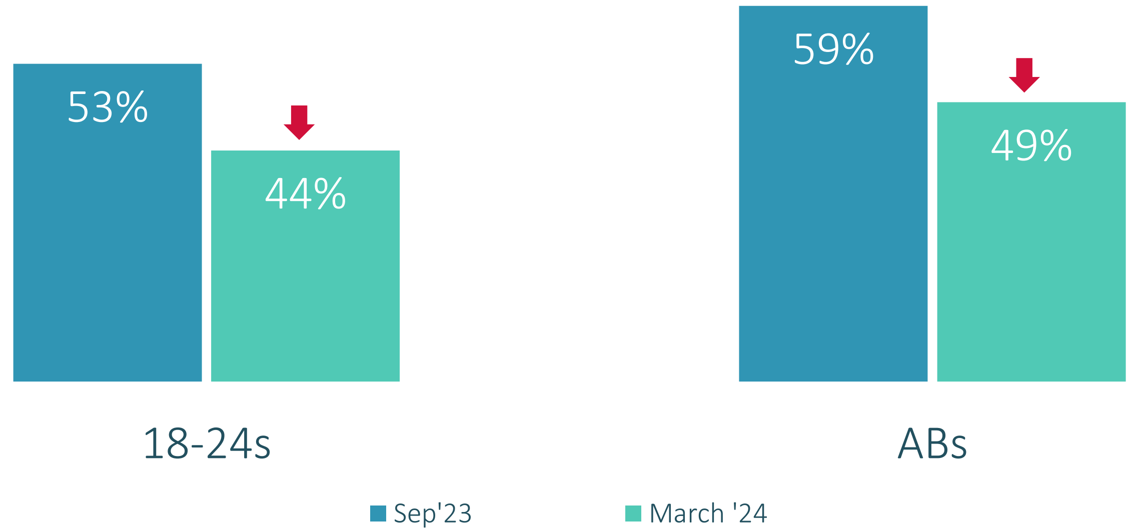
With the cost-of-living crisis affecting everyone, we see more pragmatism in switching brands

18-24s and ABs are now less likely to switch away from brands they suspect of greenwashing

% Agree – By Subgroups – March '24

Total 44%

'I would strongly consider switching brands if I suspected them of greenwashing'



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Sep '23 18-24s n=213, ABs n=474, March'24 18-24s n=232, ABs n=584

Significant increase/decrease vs Sep'23

How have investment priorities for a sustainable future changed over the past 2 years among the UK population?

We asked respondents to select up to 3 areas they would like to see UK investment channeled into to achieve a more sustainable future. Results have been compared vs March 2022 (last time this question was asked)

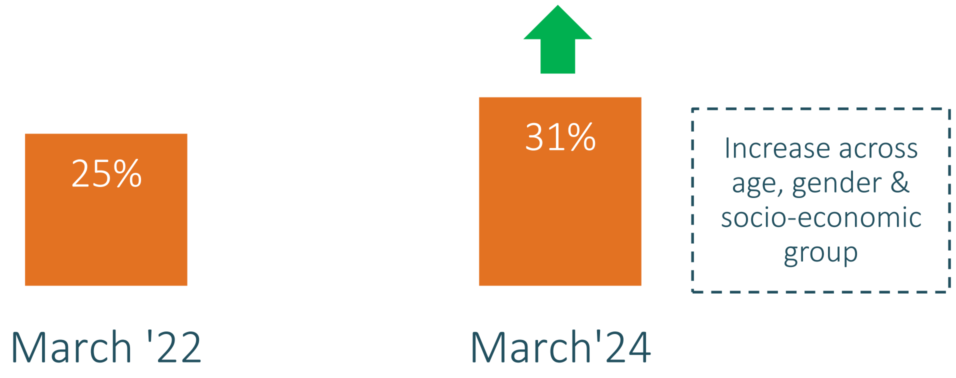
Q6: There are a range of investments that the UK can make to help build a sustainable future. Where would you like to see these investments focused? You can give up to three answers . Base: Total Sample March ‘24 n=2.083

Significant increase in desire for investment into public transport, but decline in desire for electric car charging infrastructure

Public transport moves from 3rd to 2nd place for investment priority, with electric car charging now seen as the lowest priority

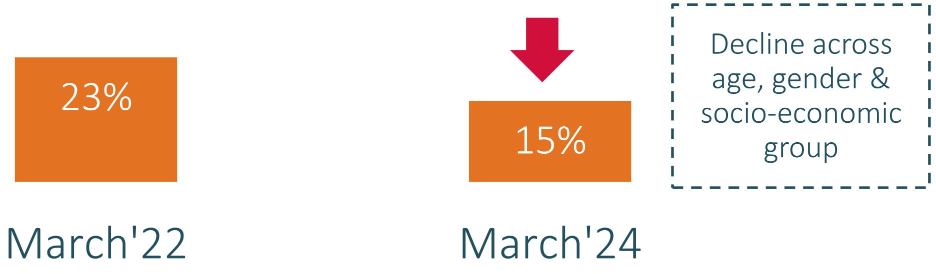
Investment Desire – By Subgroups – 2-year comparison

'Public Transport'



Rank	4th	2nd

'Electric Car Charging Infrastructure'



Rank	6th	8th (last)

Q6: There are a range of investments that the UK can make to help build a sustainable future. Where would you like to see these investments focused? You can give up to three answers . Base: Total Sample March '24 n=2083, Men n= 1069, Women n=1001, 18-34 n=608, 35-54 n=679, 55+ n=796,AB = 584, C1 = 574, C2DE=925

Significant increase/decrease vs March'22

Recent rail strikes, rising costs and demand for better bus services have likely fueled desire for greater public transport investment

Government failing targets to fix UK railway system, watchdog reports

All 'high level benefit' targets missed and only three-quarters forecasted to be achieved by 2024/25, according to NAO

Transport

Rural bus services hit new low after losing out on post-Covid funding

More than a quarter of routes in English county and rural areas have been lost over 10 years

Trains to Europe may be better for the climate, but they're four times more expensive than flying

Rail fares to rise by 4.9% in England and Wales on Sunday

26.02.2024

THE DECLINE OF BUS SERVICES IN RURAL ENGLAND: A DEEPENING DIVIDE

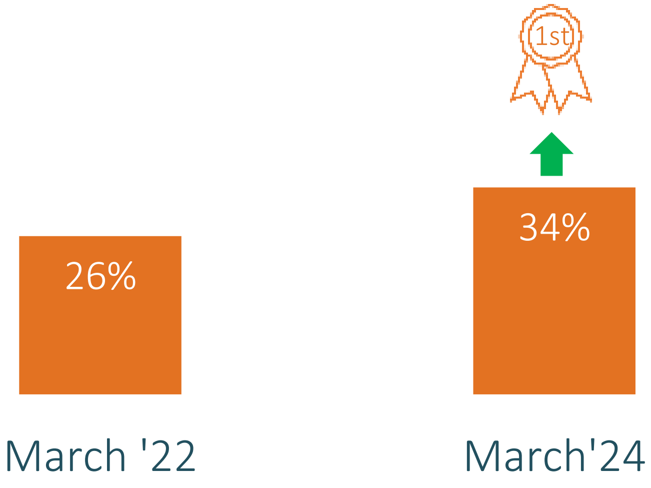
Trains to Europe may be better for the climate, but they're four times more expensive than flying | Climate News | Sky News, Government failing targets to fix UK railway system, watchdog reports | Rail transport | The Guardian, Rail fares to rise by 4.9% in England and Wales on Sunday | Rail fares | The Guardian, Rural bus services hit new low after losing out on post-Covid funding | Transport | The Guardian, The Decline of Bus Services in Rural England: A Deepening Divide - Rural Services Network (rsnonline.org.uk)

Offshore wind/solar farms overtake Onshore as most favoured area for investment

Significant increase in desire for offshore and significant decline in desire for offshore

% Investment Desire – Total Sample – 2 years comparison

‘Offshore wind/solar farms’



Rank	3rd	1st

‘Onshore winds/solar farms’

Rank	1st	5th

Q6: There are a range of investments that the UK can make to help build a sustainable future. Where would you like to see these investments focused? You can give up to three answers . Base: Total Sample March ‘22 n=2074 , March ‘24 n=2083

Significant increase/decrease vs. March ’22

Labour target offshore floating wind farms to tackle energy security

This is part of its recent announcement of a state owned ‘Great British’ energy company

Labour is planning to invest in building floating wind farms off Britain's coast to reduce the UK's reliance on foreign energy.

Sir Keir Starmer announces plans for 'Great British Energy' company during north Wales visit

WALES | ENERGY | ENERGY BILLS | NORTH WALES

Monday 25 March 2024 at 2:48pm

Source: Labour targets floating wind farms to boost energy security - BBC News, Sir Keir Starmer announces plans for 'Great British Energy' company during north Wales visit | ITV News Wales

Twice as many people in the UK now think investment for a sustainable future needs to be directed into upgrading Victorian sewers than they did 2 years ago (18% ⇧ vs 9%)*

* = 55+ (27%) △ vs 18-34s (8%)

Q6: There are a range of investments that the UK can make to help build a sustainable future. Where would you like to see these investments focused? You can give up to three answers . Base: Total Sample March '24 n=2083, 18-34 n=608, 55+ n=796

⇧⇩ Significant increase/decrease vs. March '22

△▽ Significantly higher/lower than other groups @95%

Sewage issues in the UK have escalated over the past 2 years

Water companies released record spills of raw sewage into rivers and seas in England last year.

According to the Environment Agency there were 3.6 million hours of spills compared to 1.75 million hours in 2022.

Spotlight on Policy > Sustainability > Climate | 9 August 2023

Sewage, shortages and spills: how UK water companies have failed

Is this a moment of reckoning for the UK's water industry?

Thames Water boss quits after sewage spills

27 June 2023

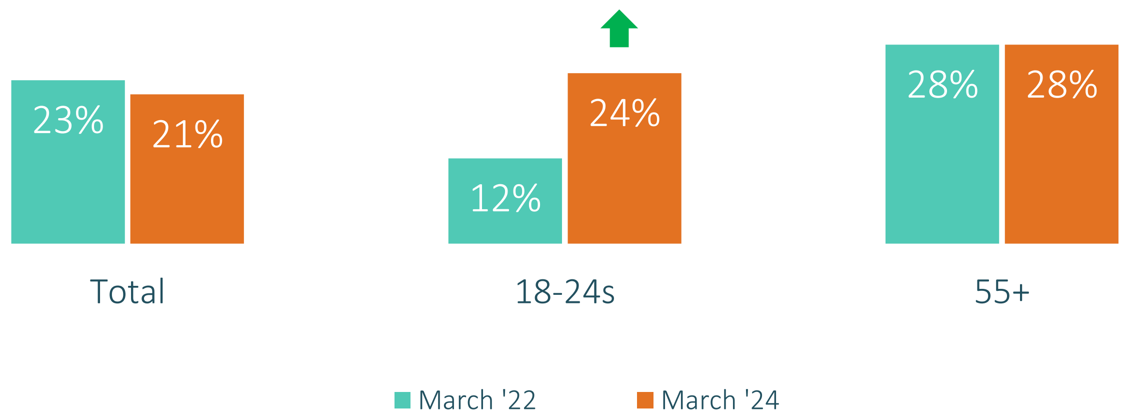
News Article Sources: Thames Water boss quits after sewage spills - BBC News, Sewage, spills and shortages: why UK water companies have failed - New Statesman, Record sewage spills into England rivers and seas in 2023 - BBC News

Despite being stable at a total level, 18-24s are now twice as likely to favour nuclear energy

The gap previously seen between 18-24s and 55+'s has now reduced

% Investment Desire – By Subgroups – 2 years comparison

'Nuclear Energy'



Q6: There are a range of investments that the UK can make to help build a sustainable future. Where would you like to see these investments focused? You can give up to three answers. Base: Total Sample March '22 n=2074 , 18-24 n= 223, 55+ n=796. March '24 n=2083 18-24 n= 232, 55+ n=796

Significant increase/decrease vs March '22

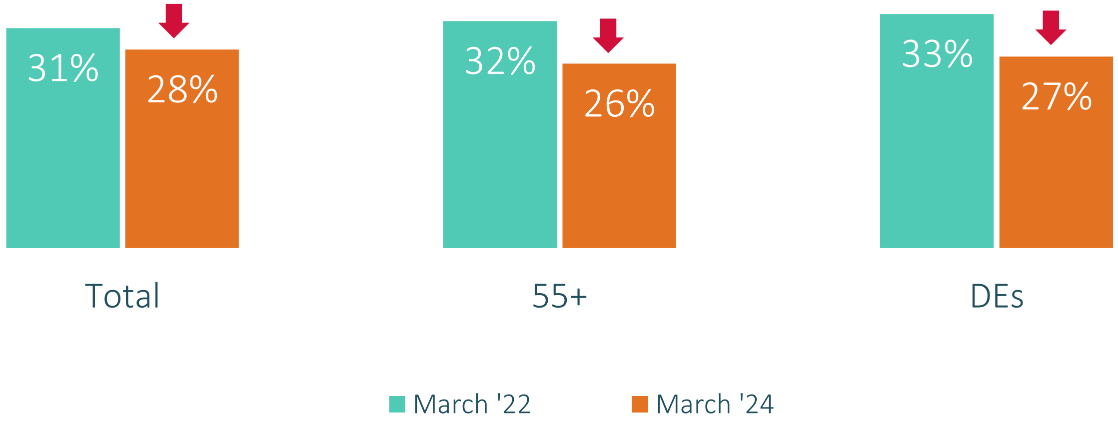
Significantly higher/lower than other groups @95%

Investment into retrofitting homes is seen as significantly less important vs 2 years

This is driven by 55+ and DEs

% Investment Desire – By Subgroups – 2 years comparison

'Retrofitting homes'



Significant increase/decrease vs March '22

Q6: There are a range of investments that the UK can make to help build a sustainable future. Where would you like to see these investments focused? You can give up to three answers . Base: Total Sample March '22 n=2074 , 55+ n=796, DEs n= 487, March '24 n=2083, 55+ n=796, DEs n=491

The UK has one of the oldest and leakiest housing stocks in Europe, yet 80% of homes lived in today will still be inhabited in 2050.

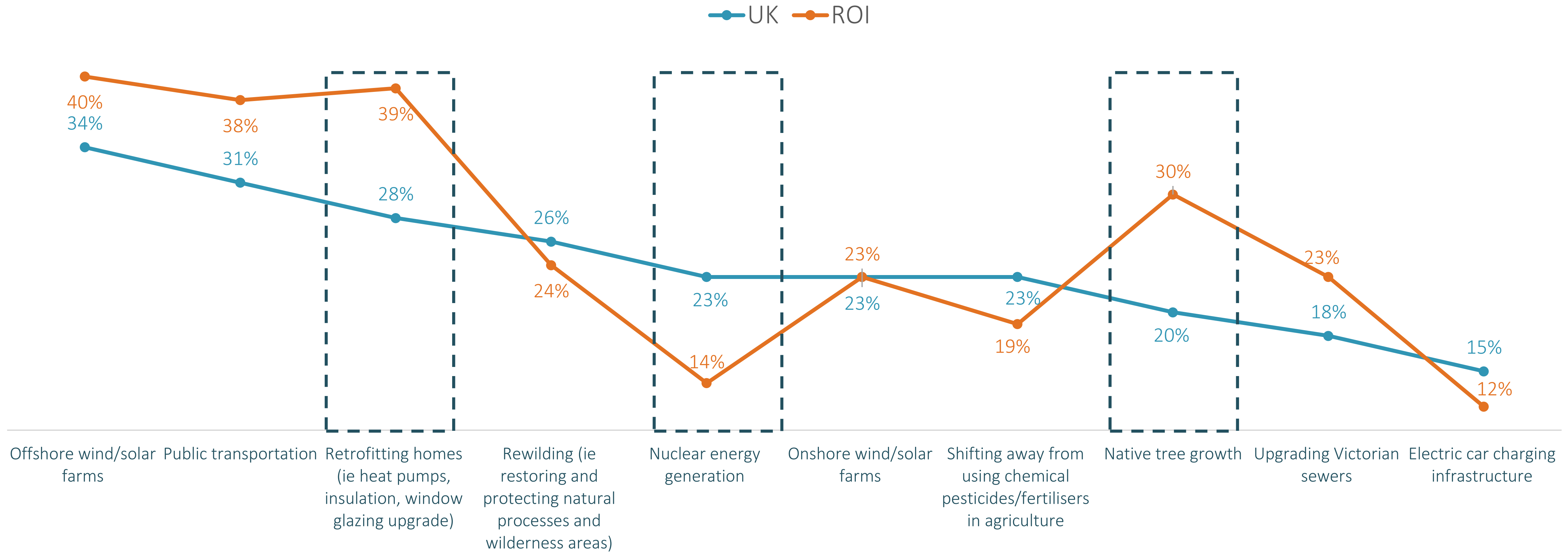
Without urgent action to retrofit, homes will continue to waste precious and increasingly expensive energy.

Source: Home Retrofit | UKGBC

Nuclear Energy generation is seen as a greater priority in the UK vs ROI

Retrofitting homes and Native tree growth are seen as less important in the UK vs the ROI

% Investment Desire – Total sample – UK vs ROI



Q6: There are a range of investments that the UK can make to help build a sustainable future. Where would you like to see these investments focused? You can give up to three answers
(Base: all adults aged 18+)

THANK YOU

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