



UK Consumer Sustainability

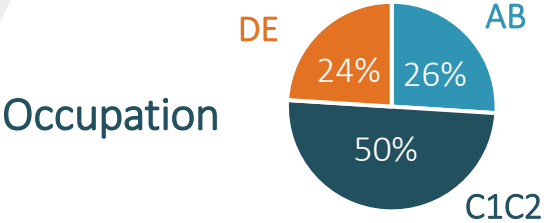
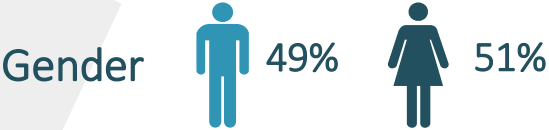
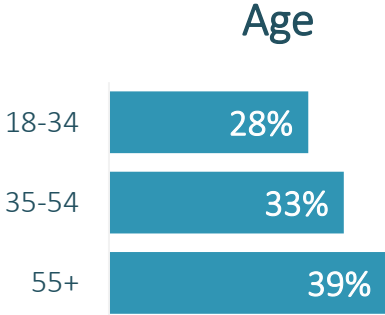
October 2024
REDC



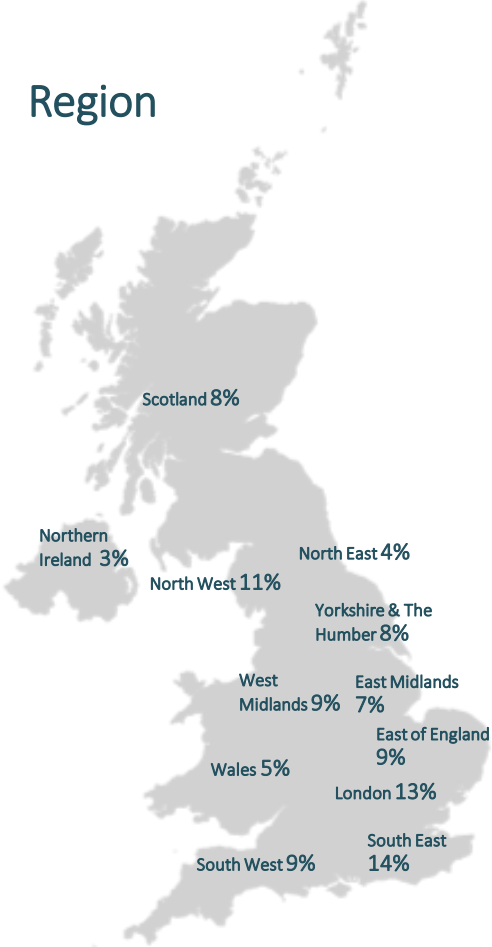
Sample and methodology



- Online Survey among a Nat Rep Sample of N = 2,072
- Fieldwork conducted: 27th – 29th September 2024



Region





1

Summary

Key takeouts

What it means



External pressures continue to be a barrier for sustainability: Over half of UK consumers want to “live more sustainably but [are not] able to financially afford the changes needed to do so (51%)”



Sustainability continues to take a back seat as consumers battle other challenges they perceive as more immediate.



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 impacted by increases in ‘Cost of Living’



7 in 10 UK consumers agree that they expect brands to lead on helping them live more sustainably (70%), suggesting that people are turning to brands for the solutions



A portion of UK adults want to live more sustainably but there is still an education piece needed to support this. Brands are expected to lead on this.



1 in 3 claimed to have switched products / brands due to sustainability concerns. However, ABs are now more likely to switch away from a brand guilty of greenwashing.



Practical factors such as price are more critical than sustainability in driving consumer choices in the cost-of-living crisis. However, once these basic needs are met, consumers are open to prioritising sustainability.



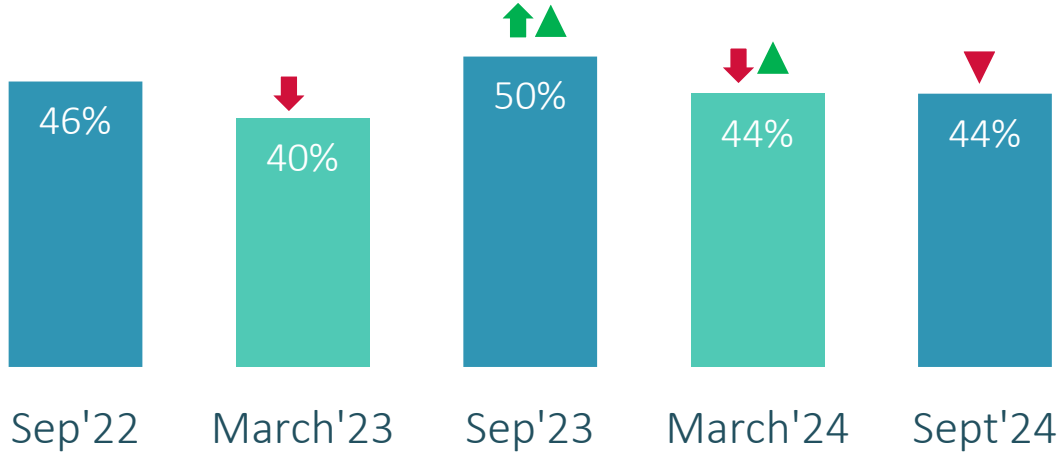
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Sustainable attitudes

Just over 2 in 5 continue to say environmental problems have a direct effect on their life today

T2B Agree – Total Sample - WoW

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



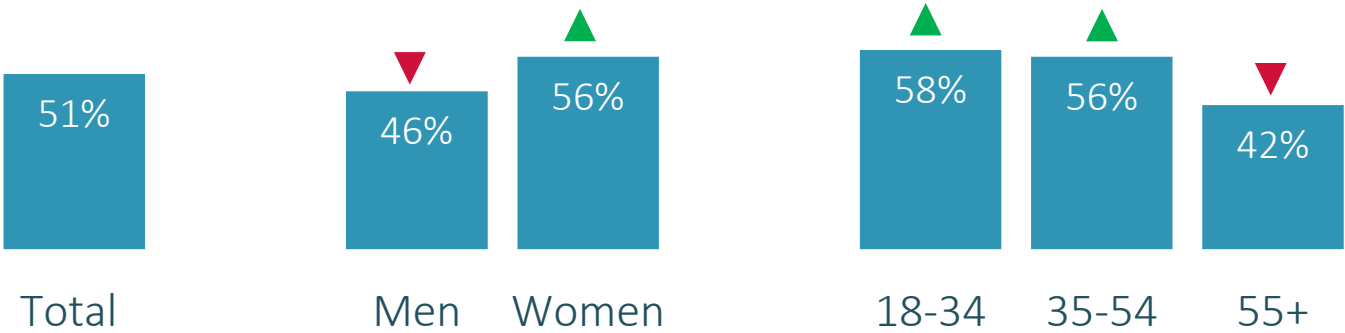
Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment? Base: Total Sample September 22 n=2078, March 23 n= 2092 September '23 n=2074, March 2024 =2083, September 2024 = 2072

Half continue to agree that they'd like to live more sustainably, but can't afford to do so

Women and those aged under 55 are more likely to agree

T2B Agree – By Subgroups – September '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

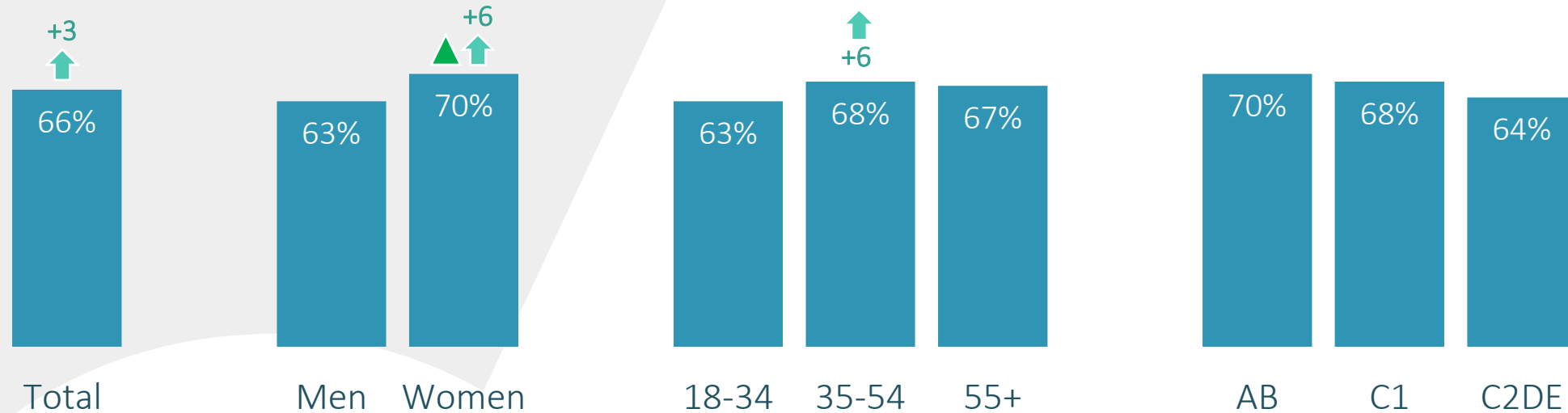
Slight 3 ppts increase in those who say their personal actions can improve the environment



Two thirds still agree with this statement, with agreement highest among women

T2B Agree – By Subgroups – September '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 September '24 n=2072, Men n= 1038, Women n=1026, 18-34 n=571, 35-54 n=716, 55+ n=785, AB = 587, C1 = 501, C2DE=984



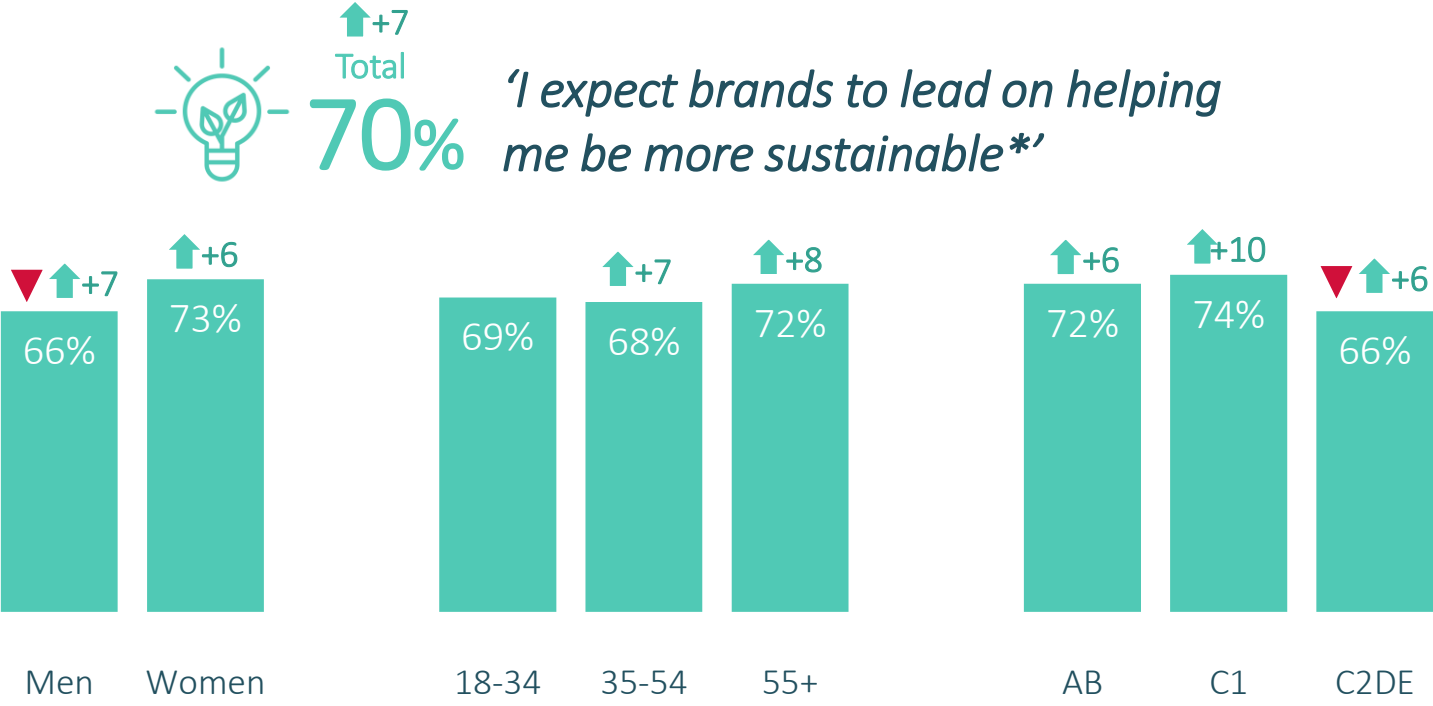
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The responsibility
for brands to act

7 in 10 Brits now expect brands to take the lead on helping them live more sustainably

Increases are observed across a wide range of demographics illustrating how widely held this belief is

% Agree – By Subgroups – September '24



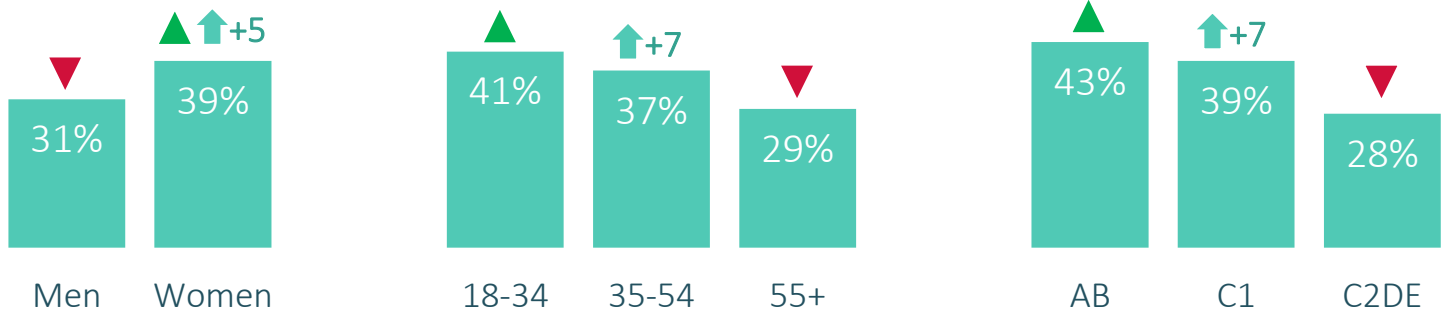
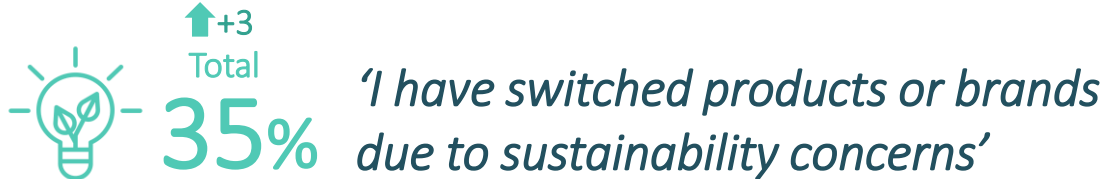
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↑ ↓ Significant increase/decrease vs March '24
▲ ▼ Significantly higher/lower than other groups @95%

More claiming to have switched products/brands

Over a third now say they have switched products or brands due to sustainability concerns, up significantly since March '24. Agreement is highest among women, under 35s and higher social grades.

% Agree – By Subgroups – September '24



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample September '24 n=2072, Men n= 1038, Women n=1026, 18-34 n=571, 35-54 n=716, 55+ n=785, AB = 587, C1 = 501, C2DE=984

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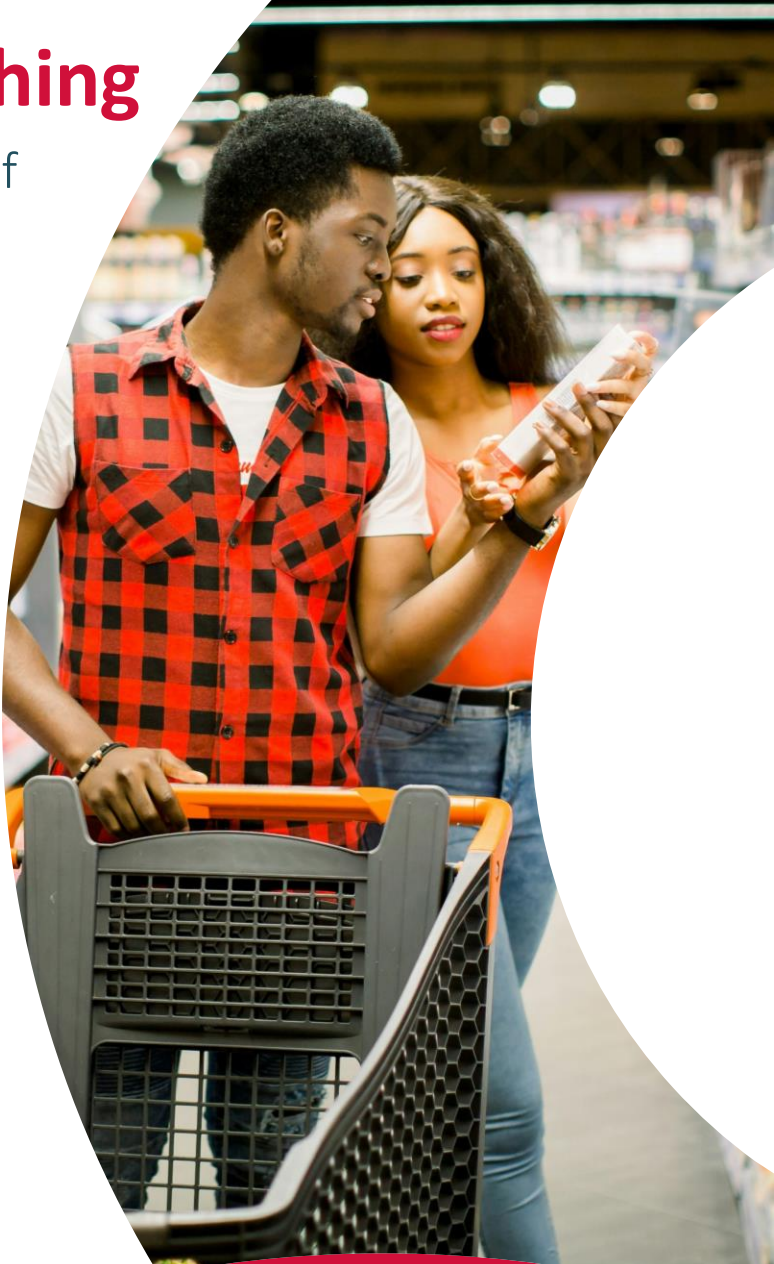
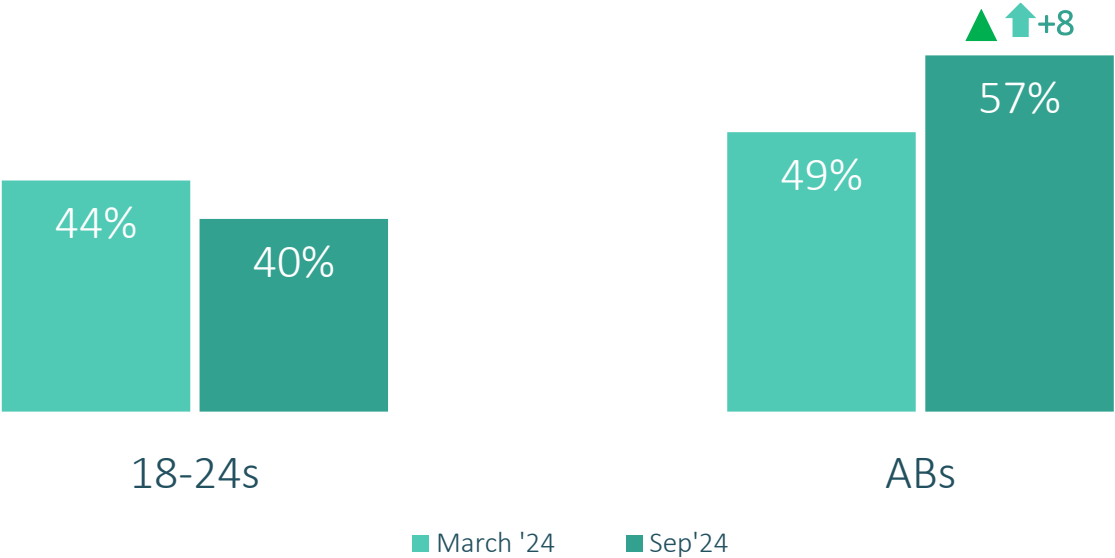
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More would consider switching due to greenwashing

Almost half would now strongly consider switching brands if they suspect them of greenwashing, up significantly since March. Agreement is highest among, and up among, AB social grades.

% Agree – By Subgroups – September '24

←...→ ↑+3
Total
47% *'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: Total sample Sep '24 n=2072; 18-24s n=212, ABs n=587

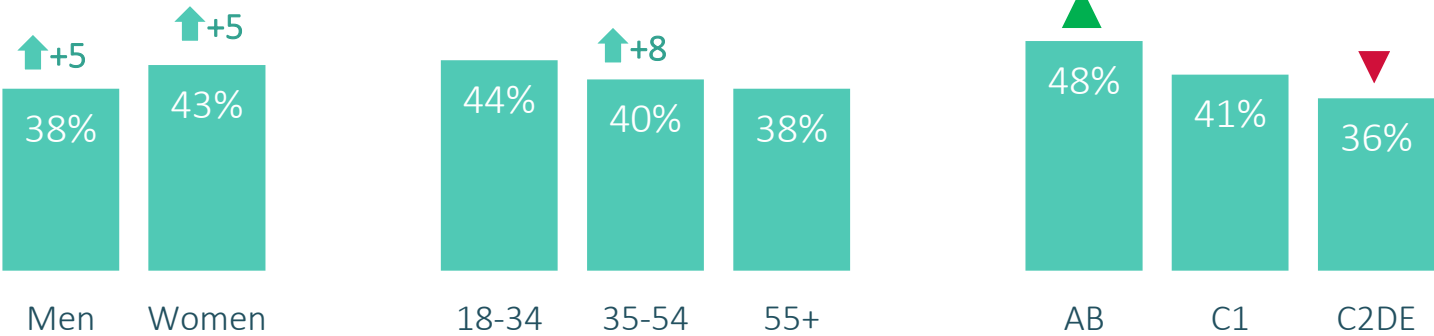
↑↓ Significant increase/decrease vs March'24
▲▼ Significantly higher/lower than other groups @95%

More seeking out sustainably sourced products





Over 2 in 5 now say they seek out sustainable products, up 5PP since March. Agreement is highest among higher social grades, and is up most notably among 35-54 year olds.

% Agree – By Subgroups – September '24


41%
↑+5
Total
‘I specifically seek out products that are sustainably sourced/produced’




Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample September '24 n=2072, Men n= 1038, Women n=1026, 18-34 n=571, 35-54 n=716, 55+ n=785, AB = 587, C1 = 501, C2DE=984

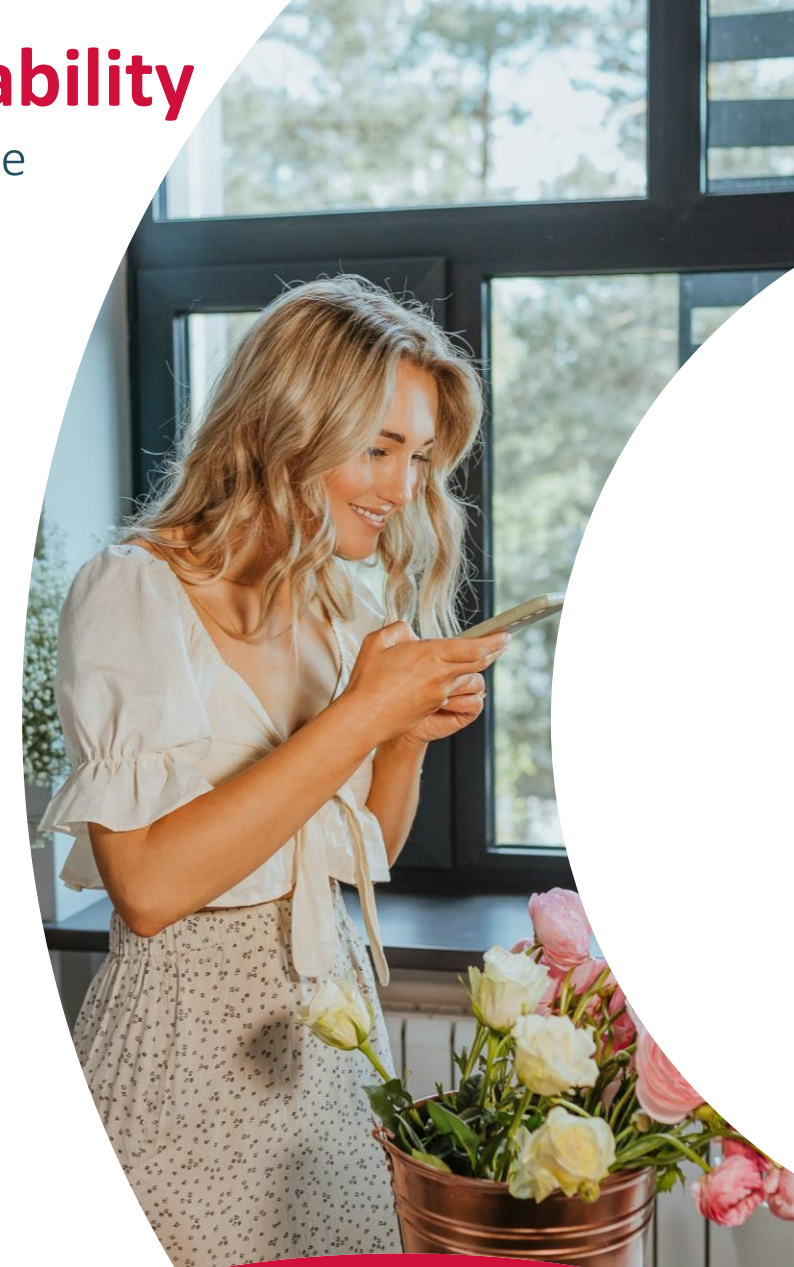
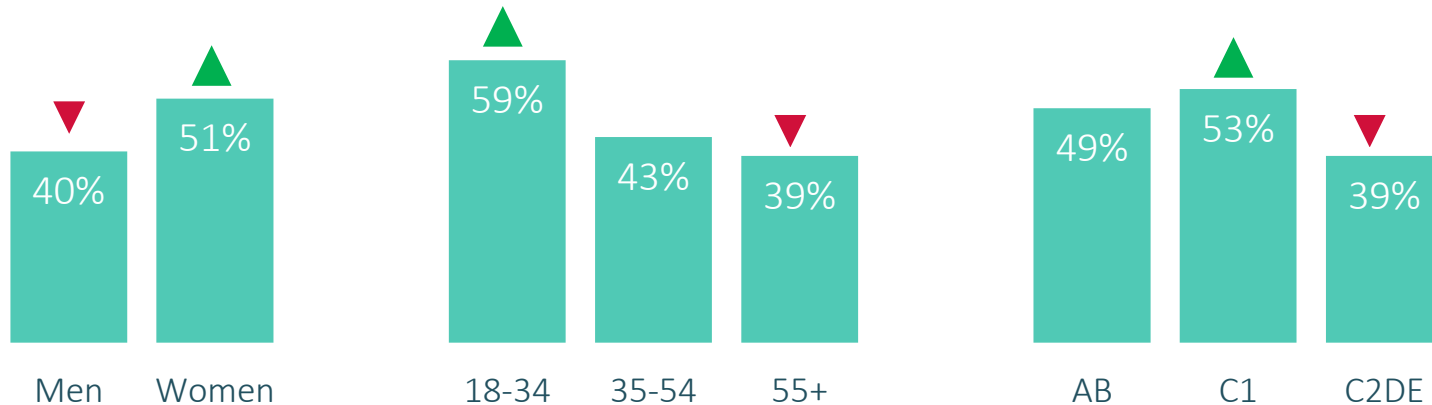
  Significant increase/decrease vs March'24
  Significantly higher/lower than other groups @95%

Strong interest in influencers promoting sustainability

With little change year-on-year, almost half continue to say they would like to see influencers promoting sustainable products more. Agreement is at almost 3 in 5 among 18-34 year olds.

% Agree – By Subgroups – September '24

 Total **46%** *'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 '24 n=2072, Men n= 1038, Women n=1026, 18-34 n=571, 35-54 n=716, 55+ n=785, AB = 587, C1 = 501, C2DE=984


 Significant increase/decrease vs September '23

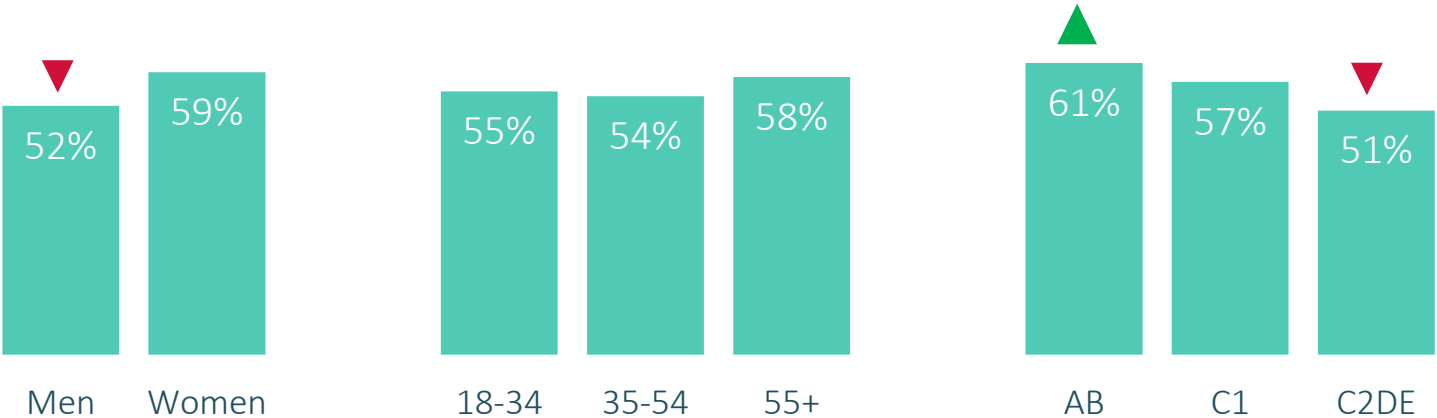
 Significantly higher/lower than other groups @95%

Most would like to reduce emissions

Almost 3 in 5 say it is very important for them personally to reduce their carbon emissions. Agreement is highest among women and higher social grades.

% Agree – By Subgroups – September '24

 **Total 56%** *'It is very important to me personally to reduce my carbon emission'*



**new question added this wave*



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample September '24 n=2072, Men n= 1038, Women n=1026, 18-34 n=571, 35-54 n=716, 55+ n=785, AB = 587, C1 = 501, C2DE=984

7 in 10 claim to understand how to live sustainably

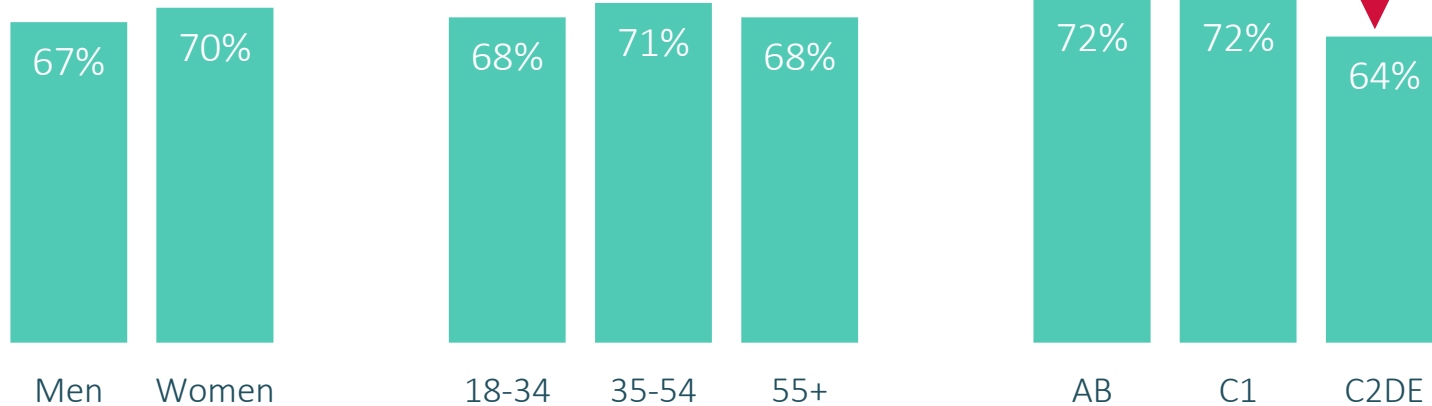
A clear majority across all cohorts say they have a good understanding of what it means to live more sustainably. This is slightly lower among lower social grades.

% Agree – By Subgroups – September '24



Total
69%

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



**new question added this wave*



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample September '24 n=2072, Men n= 1038, Women n=1026, 18-34 n=571, 35-54 n=716, 55+ n=785, AB = 587, C1 = 501, C2DE=984



Significantly higher/lower than other groups @95%

THANK YOU

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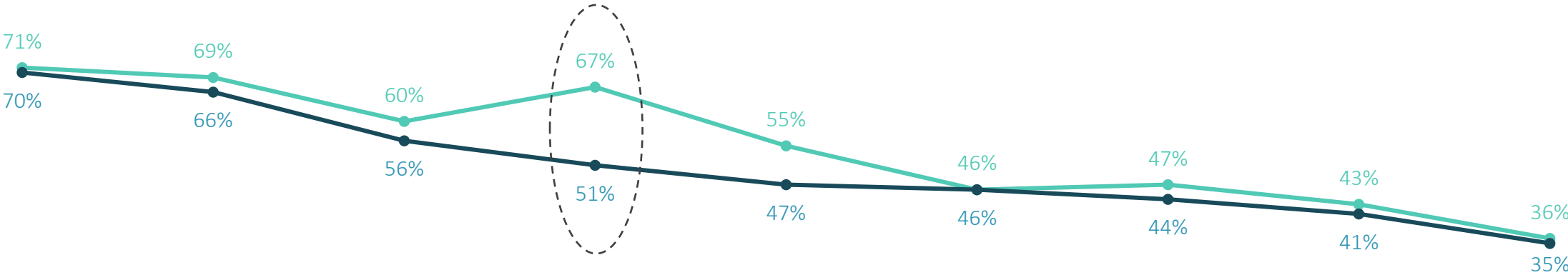


ROI and UK closely aligned on most sustainability issues



ROI residents are notably more likely to say they'd like to live more sustainably, but can't afford to do so; and almost somewhat more likely to consider switching brands due to greenwashing concerns.

% Agree



- I expect brands to lead on helping me be more sustainable
- I believe my personal actions can improve the environment
- It is very important to me personally to reduce my carbon emissions
- I would like to live more sustainably, but I cannot financially afford to make the changes needed to do so
- I would strongly consider switching brands if I suspected them of greenwashing
- I would like to see influencers promoting sustainable products more
- Environmental problems have a direct effect on my life today
- I specifically seek out products that are sustainably sourced/produced
- I have switched products or brands due to sustainability concerns

— ROI — UK

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

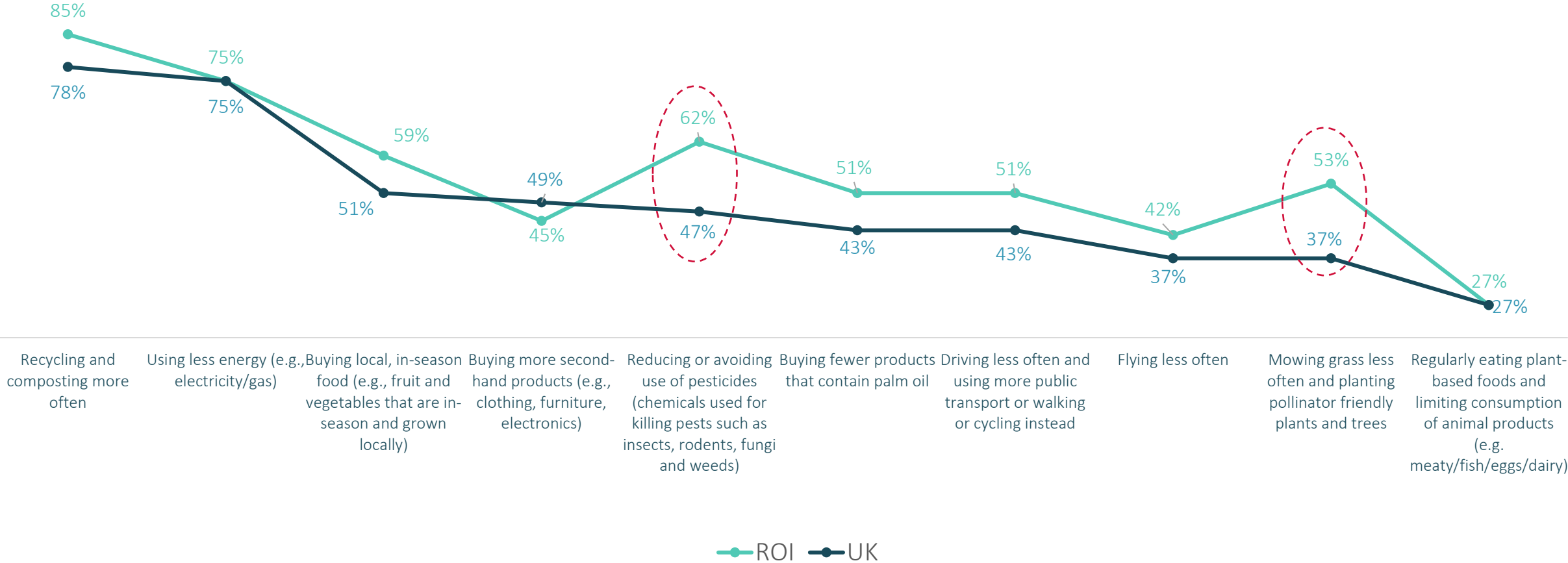
(Base: all adults aged 18+)

Similar behaviours seen in ROI and UK



ROI residents are more likely to already be reducing/avoiding use of pesticides; and more likely to already be mowing grass less often/planting pollinator friendly plants

% currently doing this (excluding not applicable)



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+)