Sustainability tracker
UK results
Wave 11

April 2025

Methodology & sample

METHODOLOGY

Online Survey among a Nat Rep sample of n=2,093 UK adults

Fieldwork:
7th - 9th March 2025

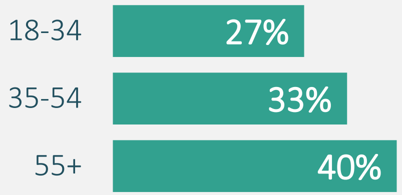
Wave #11 (started in March 2020). Previous wave conducted in September 2024

Conducted in partnership with

.YONDER

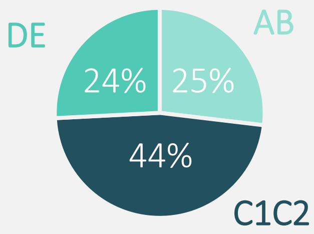
SAMPLE

Age

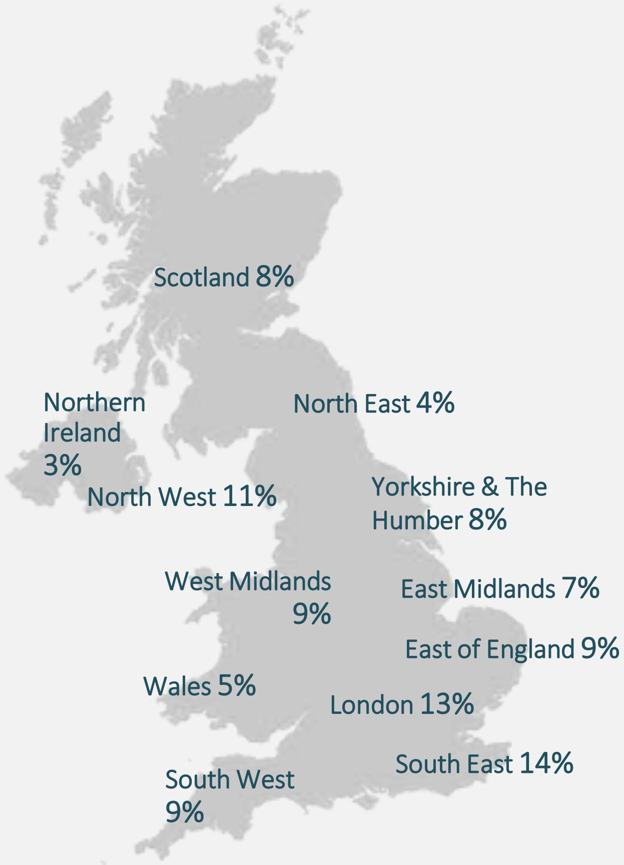


Gender

Occupation



Region



Key takeouts & what it means for brands

Growing doubt about impact of personal actions	• Reinforce the message that small actions add up • Authentic storytelling and transparency about impact are important
Environmental issues feel less 'personal'	• Link sustainability not just to the planet, but to everyday benefit like health, cost savings or community wellbeing
Consumer action drops, partly due to confusion about products real sustainability credentials	• Simplify the sustainable choice through better labeling and clearer messaging • Where possible, work on making sustainability the default, not the premium option
Expectation for brand leadership remains high	• Brand that take proactive, visible steps toward sustainability will deepen trust Watchout: consumers will identify 'greenwashing'
Shifting green energy preferences	• Brands in energy, transport, or tech sectors should align innovation with consumer confidence • Focus messaging and investment toward wind/solar, where trust is high

The tumultuous global context of the past 6 months has been the background of many sustainability changes

Ongoing conflicts

The New York Times

Russia-Ukraine War

A bitter and bloody war in Ukraine has devastated the country, further isolated Russia from the West and fueled economic insecurity around the world.

Heightened economic stress

Cost of living crisis set to intensify again as bills mount despite surprise fall in inflation

Markets mixed as investors brace for Trump tariffs

Tense electoral climate

At least 70 countries have elections in 2024. A guide in maps and charts

Changes on sustainability front

Clean energy powered 40% of global electricity in 2024, report finds

Climate change taken off America's global threat list for the first time in over a decade

Amount of electricity needed to power world's data centres expected to double in five years

On 30 September the UK became the first G7 country to abandon coal power.

Individual actions

Almost 7 in 10

have a good understanding of what it means to live more sustainably (67%), in line with last wave

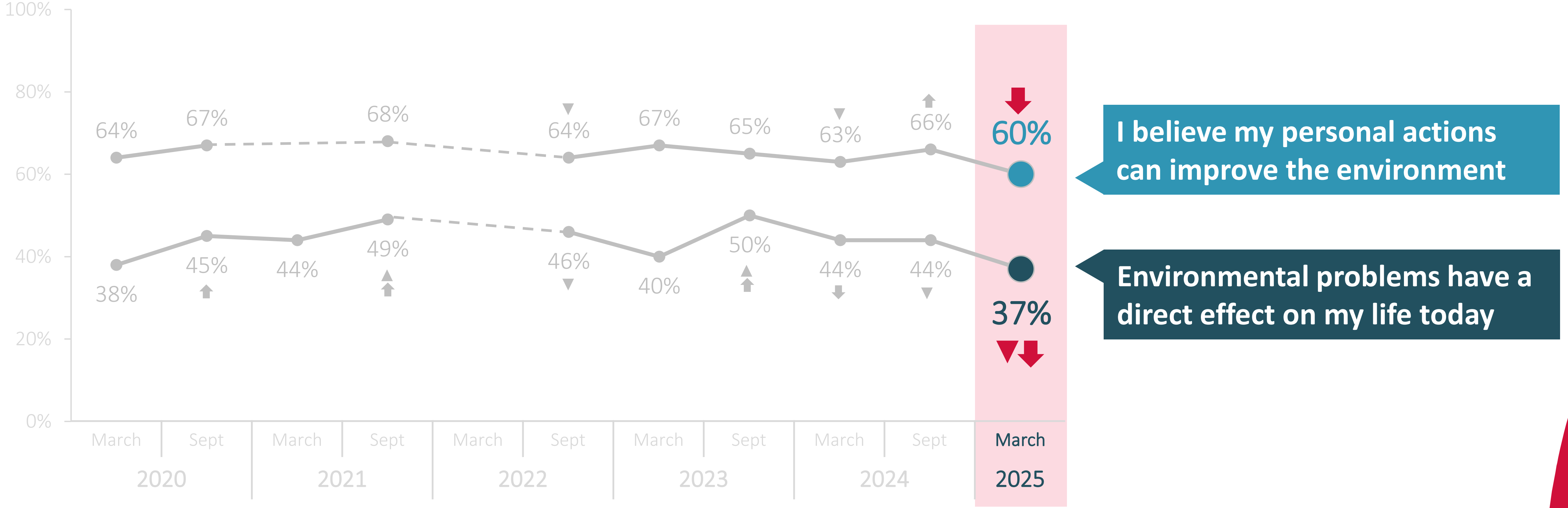
ABC1 more likely to feel they have a good understanding vs C2DE, but no differences in age or gender

RED C Research – 7th to 9th March 2025
Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment?
"I have a good understanding of what it means to live more sustainably"
Base: Total Sample (n= 2,093)

No significant increase/decrease WoW @95%

However, belief in the impact of personal actions and perceived effect of environmental issues on personal life are both down

T2B Agree – Total Sample



RED C Research – 7th to 9th March 2025
Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment? "Environmental problems have a direct effect on my life today"
Base: Total Sample (n= 2,093), Men (n=1,046), Women (n=1,042), 25-34 (n=362), 35-54 (n=698), 55+ (n=834)

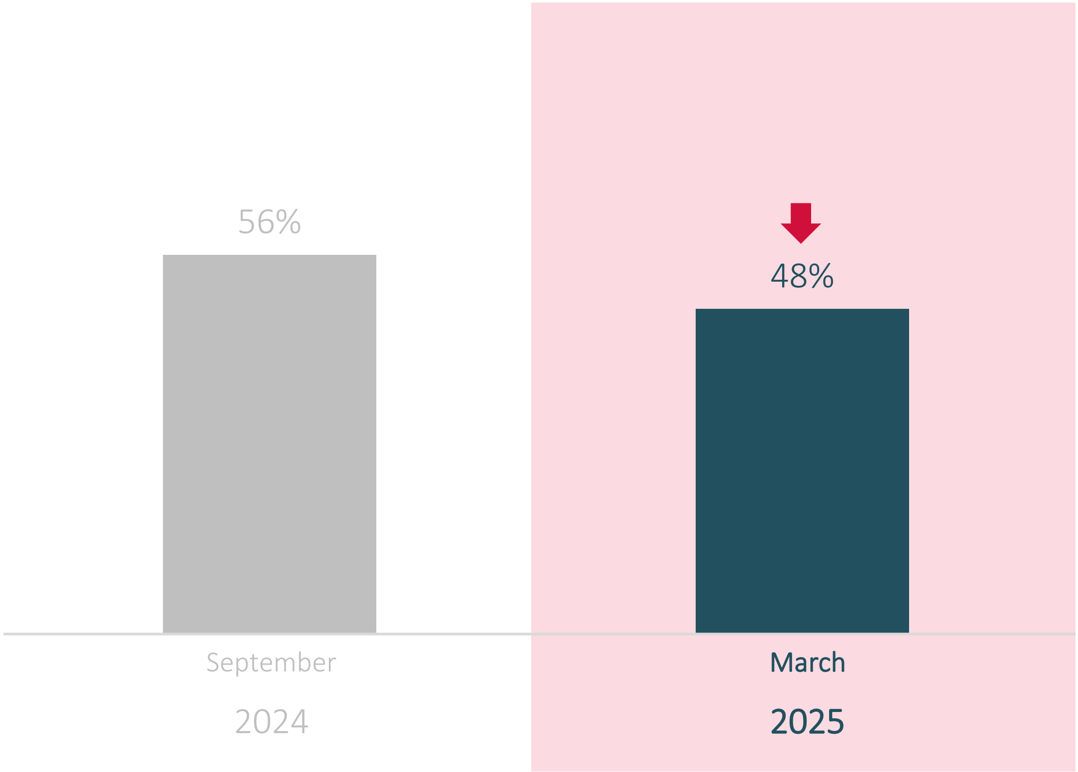
Statement(s) not asked that wave

Significant increase/decrease WoW @95%
Significant increase/decrease YoY @95%

UK Adults now less likely to feel it's important to personally reduce carbon emissions

T2B Agree – Total Sample

It is very important to me personally to reduce my carbon emissions



Decline driven by…

- Female (-10PP WoW)
- 35-44 (-8PP WoW)
- 55+ (-10PP WoW)

RED C Research – 7th to 9th March 2025

Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment? "It is very important to me personally to reduce my carbon emissions" / Base: Total Sample (n= 2,093), Women (n=1,042), 35-44 (n=358), 55+ (n=834)

Significant increase/decrease WoW @95%
Significant increase/decrease YoY @95%

As a result, proportion who actively seek out sustainable products is down WoW

T2B Agree – Total Sample

I specifically seek out products that are sustainably sourced / produced	I have switched products or brands due to sustainability concerns
36%	31%

Decline driven by…
- Female (-6PP WoW)
- 35-54 (-5PP WoW)
- 55+ (-6PP WoW)

Decline driven by…
- Female (-6PP WoW)
- 35-44 (-9PP WoW)
- 65+ (-7PP YoY)

RED C Research – 7th to 9th March 2025
Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment? "I specifically seek out products that are sustainably sourced / produced", "I have switched products or brand due to sustainability concerns"
Base: Total Sample (n= 2,093), Women (n=1,042), 35-54 (n=698), 55+ (n=834)

Significant increase/decrease WoW @95%
Significant increase/decrease YoY @95%

Role of brands and government

6 in 10

find it difficult to know which brand offerings are truly sustainable (59%)

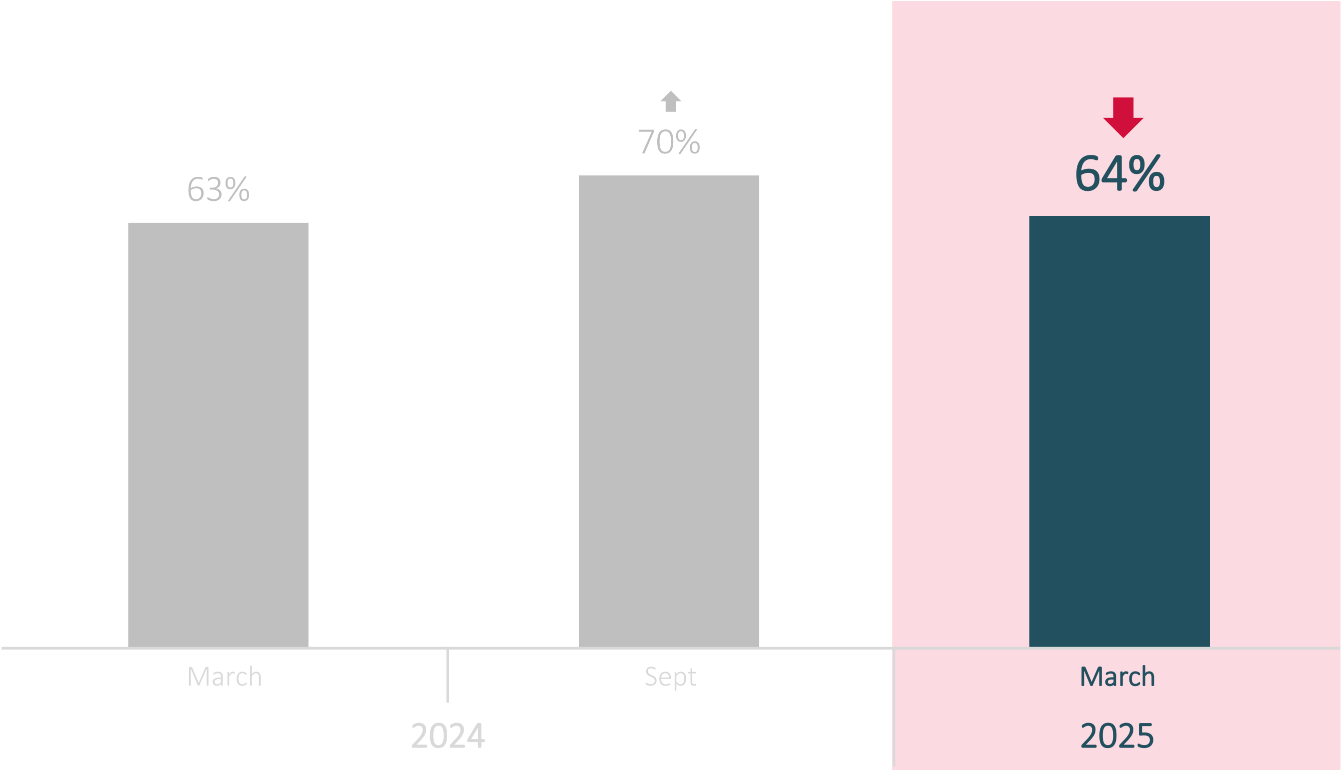
ABC1 more likely to consider it difficult vs C2DE, but no difference in age or gender

RED C Research – 7th to 9th March 2025
Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment?
“I find it difficult to know which brand offerings (i.e. products or services) are truly sustainable”
Base: Total Sample (n= 2,093)

Two thirds of UK respondents expect brands to help consumers be more sustainable, down since September ‘24

T2B Agree – Total Sample

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



Decline driven by…

- Female (-7PP WoW)
- 55+ (-9PP WoW)

RED C Research – 7th to 9th March 2025
Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment? “I expect brands to lead on helping me be more sustainable”
Base: Total Sample (n= 2,093), Women (n=1,042), 55+ (n=834)

*Statement first included in March 2024

Significant increase/decrease WoW @95%
Significant increase/decrease YoY @95%

Brands and governments have committed to Net Zero, laying groundwork for a cleaner, more sustainable future

What does 'net zero' mean?

Net zero means no longer adding to the total amount of greenhouse gases in the atmosphere.

Under the **2015 Paris climate agreement**, nearly 200 countries agreed to try to limit global temperature rises to 1.5C by 2100.

To achieve this, CO2 emissions need to fall by nearly half by 2030 and reach net zero by 2050, according to the UN's climate body, the IPCC. But despite these international commitments, emissions **remain at record highs**.

What is the UK doing to reach net zero?

To help achieve its 2050 target, UK governments have made a series of pledges, which include:

- achieving **so-called 'clean' electricity by 2030**, by rapidly increasing wind and solar generation
- ending the sale of **new fully petrol and diesel cars by 2030**
- installing **600,000 electric heat pumps a year** by 2028
- investing in **technology to capture and store CO2**

The UK's greenhouse gas emissions in 2023 were **around 50% of 1990 levels**. This figure only includes emissions generated within the UK, in line with UN reporting standards.

Under the Paris climate agreement, the UK needs to reduce its emissions **by 68% by 2030** compared with 1990 levels - a key step towards achieving net zero by 2050.

Over half

think it is important that the UK continues on the path to Net Zero by 2050, even if other countries don’t (56%)

Particularly important for 18-34s (vs other age groups) and ABC1 (vs C2DE)

RED C Research – 7th to 9th March 2025
Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment?
“It is important that the UK continues on the path to Net Zero by 2050, even if other countries don’t”
Base: Total Sample (n= 2,093)

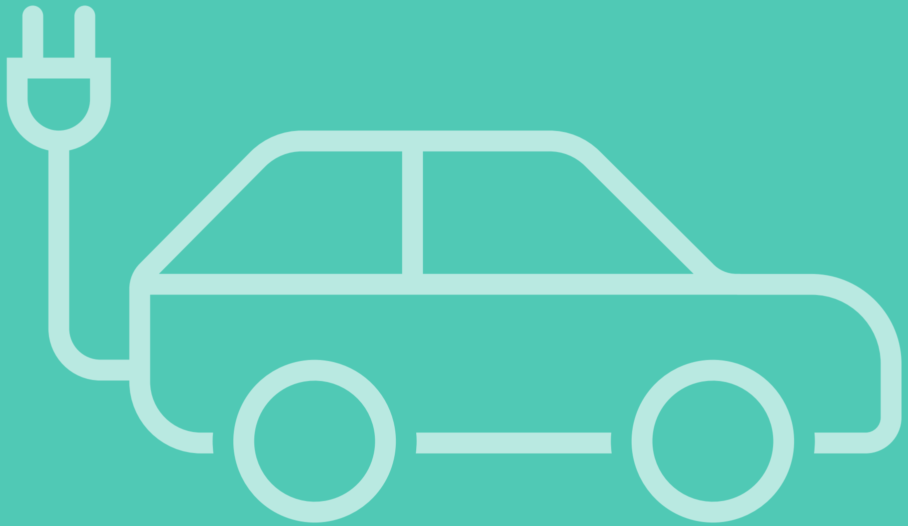
Offshore wind/solar farms are still the most popular avenues for green energy investment in the UK

Would like to see investments focused on… Total sample

▼34% Offshore wind/solar farms	⬇27% Public transportation	▼26% Retrofitting homes	26% Rewilding	24% Nuclear energy generation
▼22% Onshore wind/solar farms	22% Shifting away from using chemicals in agriculture	21% Native tree growth	▲16% Upgrading Victorian sewers	▼13% Electric car charging infrastructure

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 (n= 2,093)

⇧⇩ Significant increase/decrease vs 2024 @95%
▲▼ Significant increase/decrease vs 2022 @95%



Only 13%▼

would like to see investments focused on electric car charging infrastructure, in line with 2024 but down 10PP since 2022

Decline driven by all sub-groups

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 (n= 2,093), 2022 (n=2,074)

Significant increase/decrease vs 2024 @95%
Significant increase/decrease vs 2022 @95%

Linked to difficulty in EVs cutting through to private buyers

"One of the major constraints to growth, however, has been lacklustre demand by private buyers, with only one in 10 choosing an EV in 2024. Petrol remained the most popular powertrain among these buyers, commanding 61.0% of demand, with hybrid electric vehicles (HEVs) in second place (16.0%)"

Source: www.smmt.co.uk

GET IN TOUCH

Richard.barton@redcresearch.co.uk

Lea.trichet@redcresearch.co.uk

Jamie.clarke@redcresearch.co.uk

www.redcresearch.com

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Appendix

Q1 Trended:

T2B Agree – Total Sample

	Mar-20	Sep-20	Mar-21	Sep-21	Mar-22	Sep-22	Mar-23	Sep-23	Mar-24	Sep-24	Mar-25
Base size:	1075	1084	1086	2126	2074	2078	2092	2074	2083	*2072*	*2093*
I expect brands to lead on helping me be more sustainable	-	-	-	-	-	-	-	-	63%	70%	64%
I have a good understanding of what it means to live more sustainability	-	-	-	-	-	-	-	-	-	69%	67%
I believe my personal actions can improve the environment	64%	67%	-	68%	-	64%	67%	65%	63%	66%	60%
It is very important to me personally to reducemy carbon emission	-	-	-	-	-	-	-	-	-	56%	48%
I am actively working to reduce my carbon emissions	-	-	-	-	-	-	-	-	-	-	45%
I find it difficult to know which brand offerings (i.e. products or services) are truly sustainable	-	-	-	-	-	-	-	-	-	-	59%
It is important that the UK continues on the path to Net Zero by 2050, even if other countries don't	-	-	-	-	-	-	-	-	-	-	59%
Environmental problems have a direct effect on my life today	38%	45%	44%	49%	-	46%	40%	50%	44%	44%	37%
I specifically seek out products that are sustainably sourced/ produced	-	-	40%	-	38%	41%	39%	43%	36%	41%	36%
I have switched products or brands due to sustainability concerns	-	-	-	-	-	-	-	-	32%	35%	31%

/ = Significantly higher / lower vs previous wave @95%

Q1. How much do you agree or disagree with the following statements with regard to your personal views on the environment?

Q8 Trended:

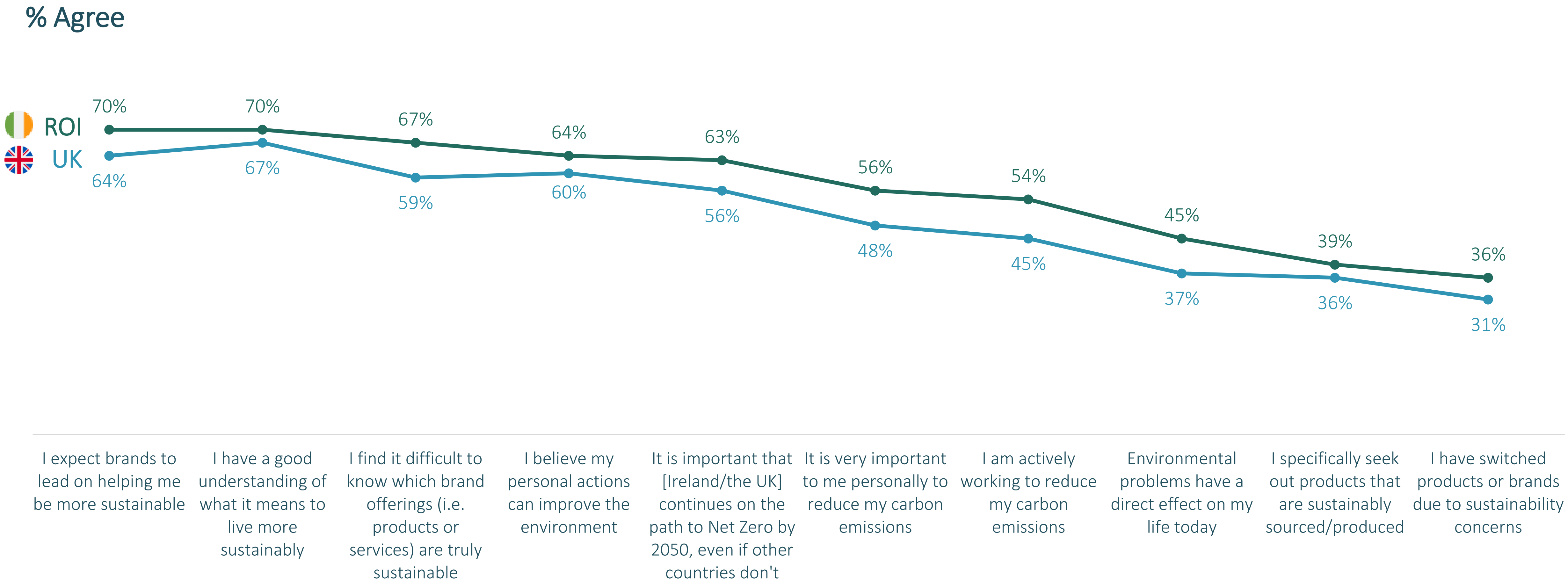
	Mar-22	Mar-24	Mar-25
Base size:	2074	2083	2093
Offshore wind/solar farms	40%	34%	34%
Retrofitting homes (ie heat pumps, insulation, window glazing upgrade)	31%	28%	26%
Public transportation	25%	31%	27%
Rewilding (ie restoring and protecting natural processes and wilderness areas)	24%	26%	26%
Onshore wind/solar farms	26%	23%	22%
Nuclear energy generation	21%	23%	24%
Shifting away from using chemical pesticides/ fertilisers in agriculture	20%	23%	22%
Native tree growth	21%	20%	21%
Electric car charging infrastructure	23%	15%	13%
Upgrading Victorian sewers	9%	18%	16%

Q8. 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.

/ = Significantly higher / lower vs previous wave @95%

Similar views on sustainability topics in ROI and UK

ROI residents are slightly more likely to agree with all statements



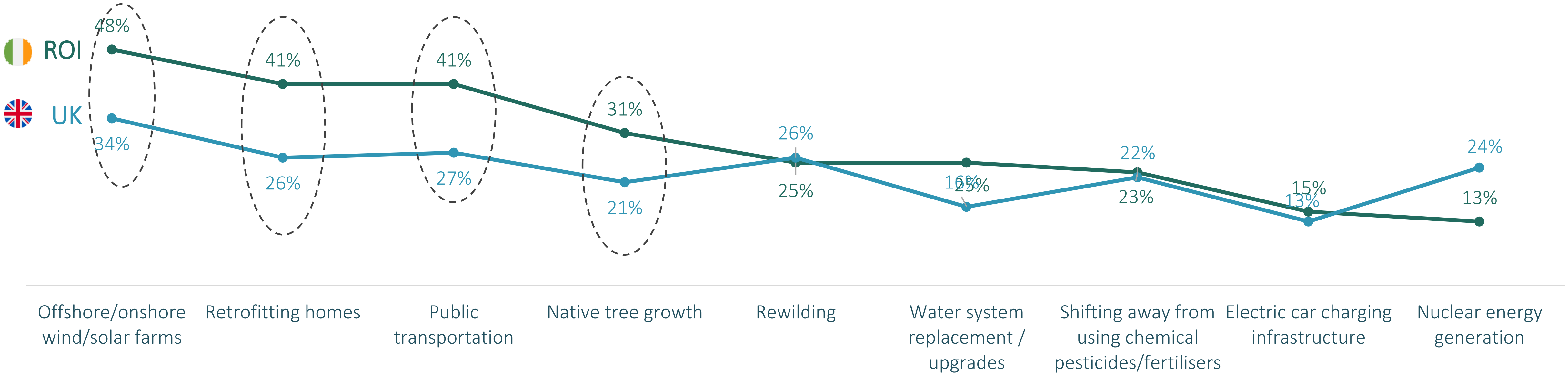
(Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?)

(Base: all adults aged 18+)

Notable gap in terms of preferred investments

ROI residents are more likely to prefer wind/solar energy; retrofitting homes; public transport; or native tree growth. Nuclear energy is more popular in the UK.

Investments would like to see for a sustainable future (NET Any)



Q8. There are a range of investments that Ireland 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+)