RED C SUSTAINABILITY MONITOR

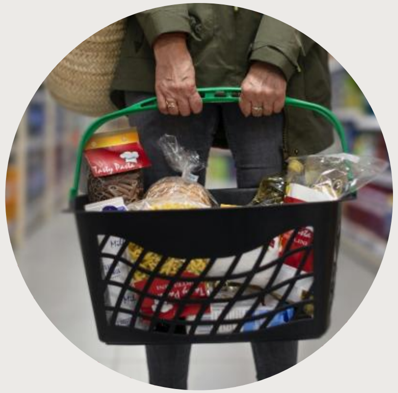
ENVIRONMENTAL ATTITUDES AND BEHAVIOURS IN IRELAND

PUBLISHED APRIL 2026
REF: 7817-2025

Strong desire for brands to lead on sustainability and reuse efforts

Expectation for brands to take leadership role and help consumers

Consumers increasingly expect brands to lead on sustainability, with transparency now critical for building trust. Clear action on renewables, biodiversity and support for public transport particularly resonates, especially with younger people.



Cost of living and trust barriers create challenges for brands

Rising living costs and confusion over which brands are truly sustainable continue to hold consumers back. These pressures fuel hesitancy around seeking out - and paying more for - sustainable options, making value and clarity essential.

A more knowledgeable consumer in relation to sustainable living

Consumers are becoming more informed about sustainable living, led by younger generations driving this growing “sustainability wave.” However, many still lack confidence, giving brands a key role in helping them understand and act more sustainably.

Majority support continued path to Net Zero by 2050

Environmental issues feel increasingly real for many people, strengthening the belief that personal actions matter. As a result, most consumers continue to back Ireland’s path to Net Zero by 2050.

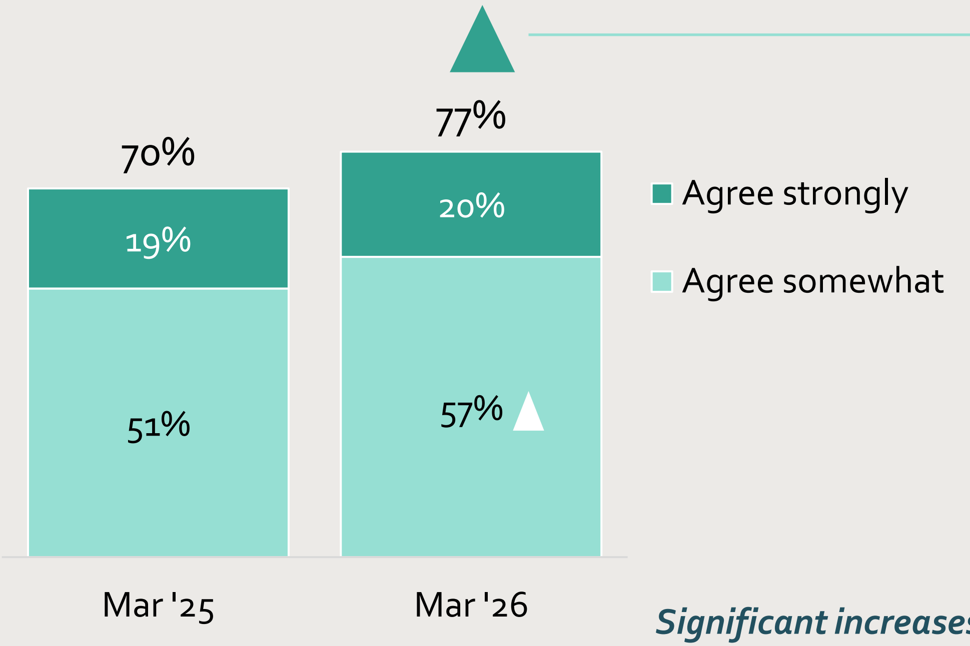
Consumers are becoming increasingly informed about sustainable living, led by a highly engaged younger generation

But a confidence gap remains - and this creates a clear opening for brands to play a leadership role, helping people feel more assured and empowered in their sustainable choices

Consumers are increasingly knowledgeable about sustainability

Over 3 in 4 now feel they have a good understanding of how to live sustainably. However, only 1 in 5 strongly agree with this, suggesting that there is more work to be done here and presenting a clear opportunity for brands.

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



Significant increases by demographics vs Mar '25

Rise in understanding is especially prevalent amongst...

+11%	+11%	+11%	+10%
Women	18-34-year-olds	Higher social grades	Those living outside of Dublin

▲▼ Indicates significant difference vs Mar '25

(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+)

Young people aged 18-34 are especially engaged with sustainability, seemingly driven by long term effects of the climate crisis

62%

+11% vs All adults

- Environmental problems have a direct effect on my life today

70%

+12% vs All adults

- I prefer to buy from brands that are transparent about their environmental and social impact

52%

+10% vs All adults

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

54%

+14% vs All adults

- I am willing to pay more for products or services from brands that demonstrate strong sustainability practices

(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+)

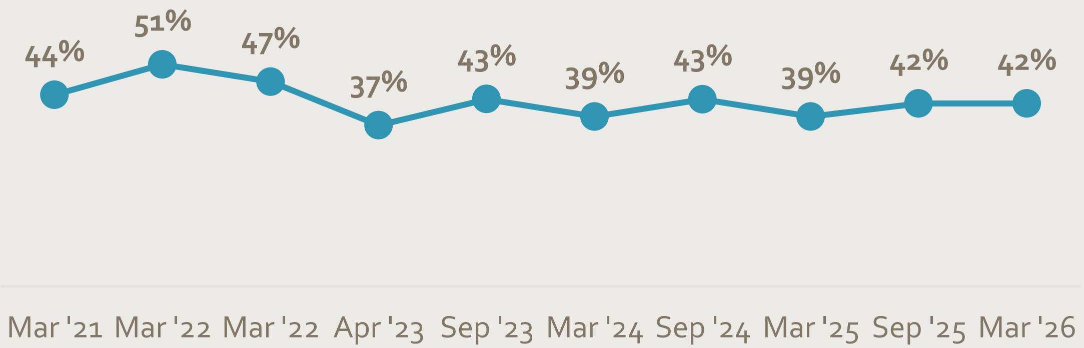
However, consumers are challenged by a persistent cost of living crisis, with sustainable living seemingly out of reach for many

On top of this, 7 in 10 are unsure of which brands are truly sustainable, thus contributing to some hesitancy amongst consumers

2 in 5 seek out and are willing to pay more for sustainable products

40% Agree that they are willing to pay more for products/services from brands that demonstrate strong sustainability practices

% Agree: I specifically seek out products that are sustainably sourced / produced



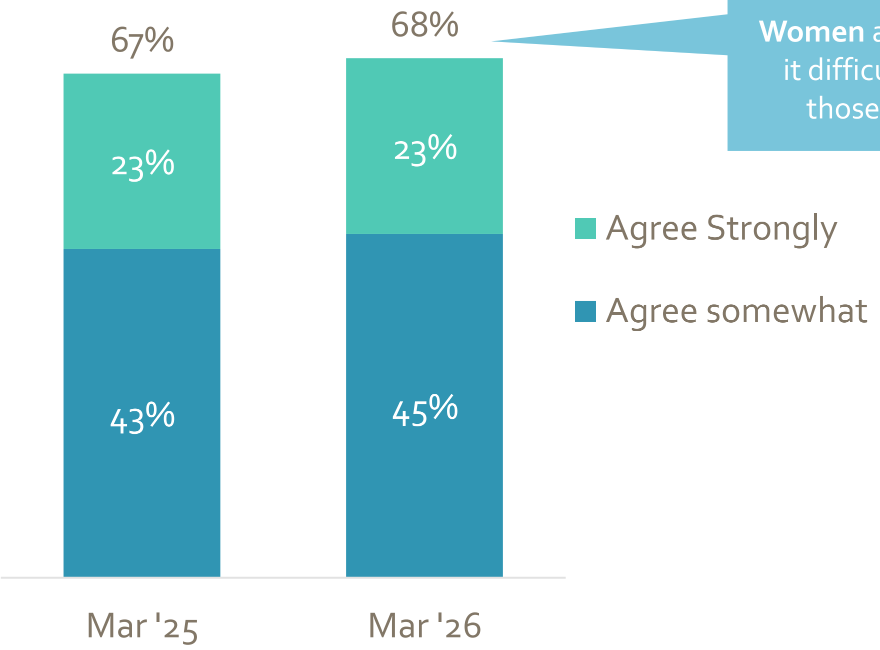
▲▼ Indicates significant difference vs Sep '25

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+)

Over 2 in 3 find it difficult to know which offerings are sustainable

% Agree: I find it difficult to know which brand offerings (i.e. products or services) are truly sustainable



Women are more likely to find it difficult (74%), especially those aged 35-54 (77%)

(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+)

How do brands navigate this?

Nearly

7/10

expect brands to lead them toward sustainable choices

Almost

8/10

say they would be more loyal to brands that help them in their personal reuse efforts

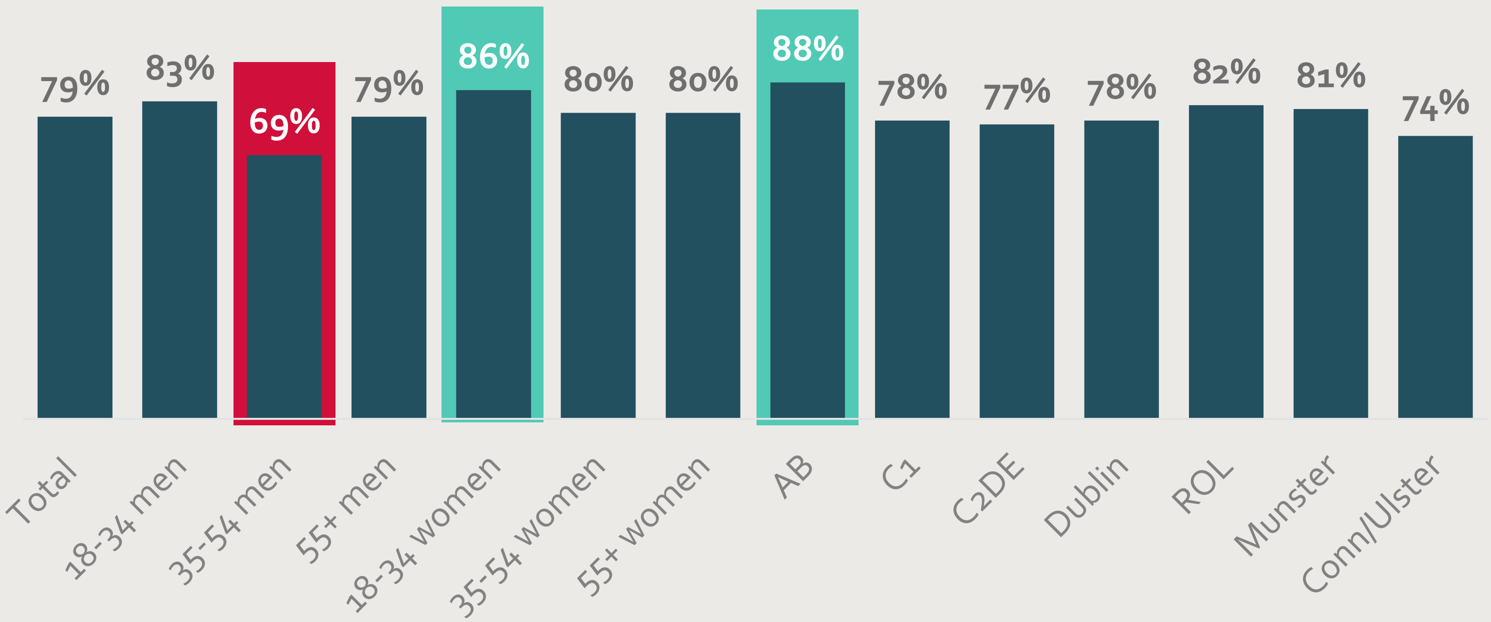
REDC

Brands that promote guidance on longevity of their products, generate a greater sense of loyalty amongst consumers

65%

Agree they would feel **greater loyalty to a brand that promotes guidance on how to fix products** and make them last longer

Young women (86%) and **AB social grades** (88%) especially agree with this



Significantly lower/higher than the national average

REDC

(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+)

Nearly

3/5

prefer to buy from brands that are transparent about their environmental and social impact

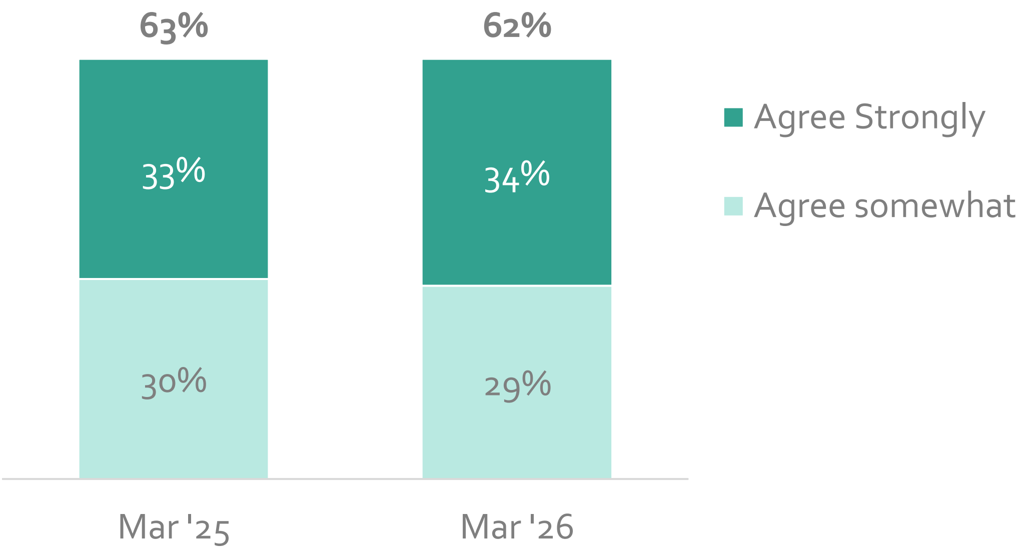
REDC

Most consumers believe climate change directly affects their lives and an overwhelming proportion feel their personal actions genuinely matter

Consumers are steadfast in their belief that Ireland should continue on its path to Net Zero by 2050

3 in 5 still see importance of continuing on path to Net Zero

% Agree: It is important that Ireland continues on the path to Net Zero by 2050, even if other countries don't



(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+)

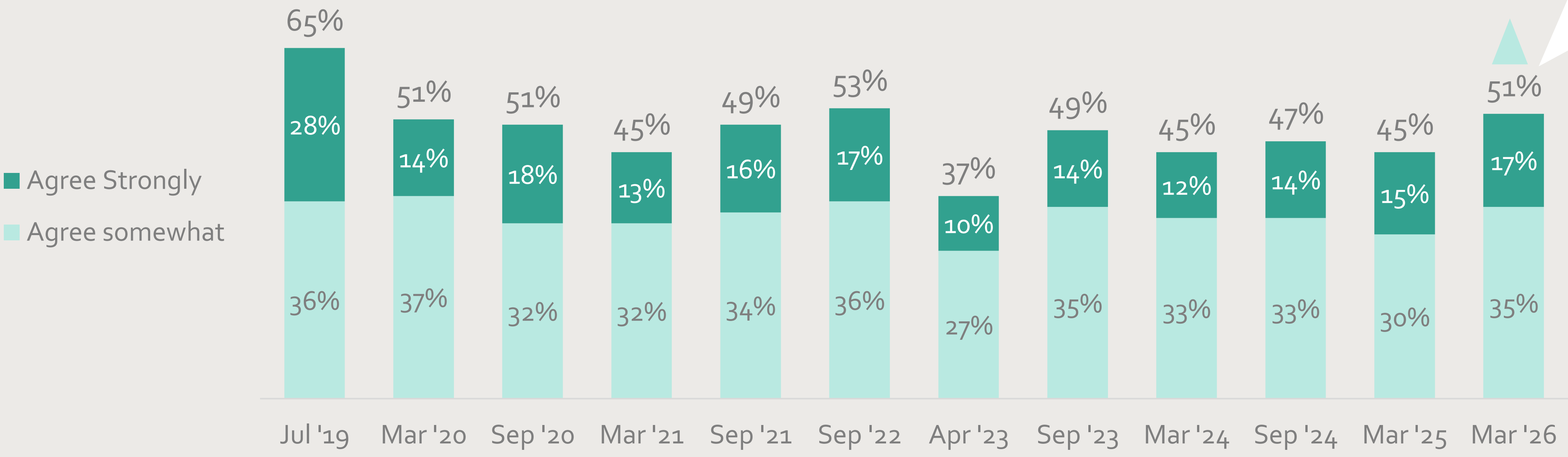
Half now view environmental problems as having a direct effect on their life, up since 2025

There is a rise of +6% since this time last year in those that perceive environmental problems as having a direct effect on their life today.

Driven by

- 18-34s (12%)
- Those living outside of Dublin (+9%)
- Women (+8%)

Environmental problems have a direct effect on my life today



▲▼ Indicates significant difference vs Mar '25

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

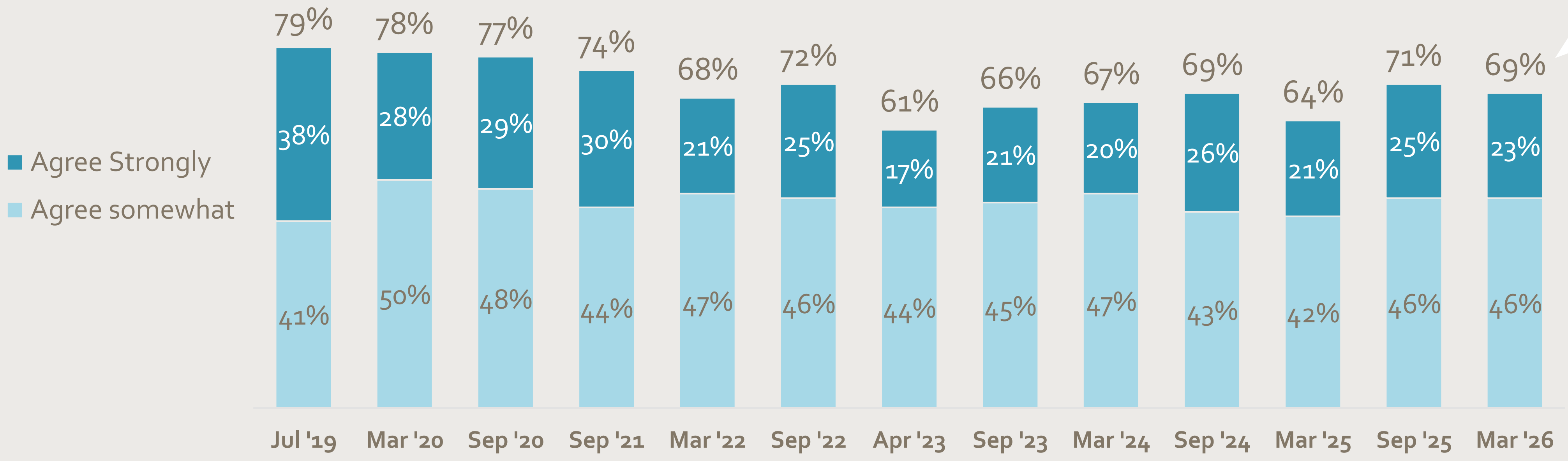
(Base: all adults aged 18+)

Meanwhile, over 2 in 3 still believe their personal actions can improve the environment

Significant majority of Irish adults believe their personal actions can improve the environment, representing a rise versus this same time last year.

Significant rebound amongst 18-34-yo women in their belief that their personal actions can improve the environment , with **3 in 4** amongst this group now in agreement with this.

I believe my personal actions can improve the environment



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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+)

WHAT OTHER STRATEGIES CAN BRANDS EMPLOY TO HELP REACH CONSUMERS?

Brands that demonstrate genuine action when it comes to renewables and nature recovery, such as rewilding, will resonate.

Transparency builds trust.

Renewables and native tree growth / rewilding likely to resonate

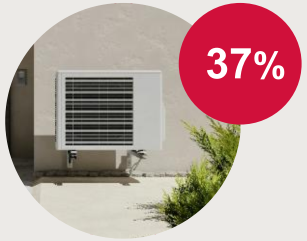
Consumers are gradually shifting to the natural environment in terms of where investment should be

Investments would like to see for a sustainable future ('26 vs '22)

-8pp
NET: Offshore/onshore wind/solar farms

+6pp
NET : Native tree growth / Rewilding

+5pp
Public transportation



-8pp ▼
Retrofitting homes
(i.e. heat pumps, insulation, window glazing upgrade)

+6pp
Water system replacement/ upgrades

-1pp
Shifting away from using chemical pesticides/fertilisers in agriculture

-12pp
Electric car charging infrastructure

+4pp
Nuclear energy generation

▲▼Indicates significant difference vs Mar '25

Q6. 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? (Base: all adults aged 18+)

An increasingly important role for brands to play

1. **Consumers increasingly expect brands to lead on sustainability**
   Trust and transparency are essential, with clear action on renewables, biodiversity and public transport resonating strongly.

2. **Cost-of-living pressures and low trust continue to hold people back**
   Uncertainty about which brands are genuinely sustainable limits willingness to choose - and pay for - sustainable options.

3. **Knowledge of sustainable living is rising, especially among younger consumers**
   However, many still lack confidence, creating a clear opportunity for brands to guide and empower them.

4. **Environmental issues feel more real and personal**
   More people report climate impacts in their daily lives, strengthening belief that their individual actions matter.

5. **Strong support remains for Ireland's path to Net Zero by 2050**
   Despite economic pressures, the majority want continued progress toward long-term climate goals.

METHODOLOGY & ABOUT RED C

Methodology

- n=1,008 online interviews were conducted on RED C's online omnibus, RED Line.
- Through an online panel of over 45,000 members, RED Line allows us to reach a representative sample of the adult population 18+ across Ireland in a cost effective and timely manner.
- Quotas were set and data weighted to ensure a nationally representative sample of the population aged 18+ years.
- The is the 14th wave of the RED C Sustainability Monitor and fieldwork was conducted between 5th to 11th March 2026.

We deliver clarity on the human behaviours that unlock growth

We help our clients understand audiences across the world, from the UK to USA, Brazil, China, UAE, Europe and more

We have a deep understanding of consumer behaviour, bringing expertise across sectors to deliver clear, action-focused insight to help our clients grow

Our team bring exceptional project management skills, expert knowledge and strategic storytelling to ensure successful delivery of every project

Our clients value our collaborative, flexible approach to partnership. We pride ourselves on being easy to work with and we're committed to building long term partnerships with our clients

We are experts in understanding the brand ecosystem

Path to purchase & price modelling

Segmentation & bringing customers 'to life'

Developing, testing & refining comms strategy

Brand & ad tracking
Loyalty & churn

Concept development & innovation (iDeator)

Customer closeness programmes

Category Entry Points & Distinctive Brand Assets

Expert advisor lens

Consumer engagement deep-dives

Semiotics & behavioural science

We use a variety of techniques to uncover and understand

Surveying

Face to Face In Person: 150 interviewers nationwide, In Home, Exit, Location

Telephone: 30 Station Outbound Telephone Centre in Dundalk

Online: Bespoke RED C Live Online Panel of 40,000+

Listening

Group Discussions: Online, WhatsApp or Face to Face

Depth Interviews: One of one or paired in depth discussions

Online Communities: 30-100 people in ongoing discussions

Monitoring

Social Media: Monitoring, Listening & Understanding

Biometric Testing: Eye Tracking, Facial Coding, Blood Pressure, Sweat

Passive Monitoring: In person movements, online journey, media consumption

SEE MORE CLEARLY

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