RED C SUSTAINABILITY MONITOR

ENVIRONMENTAL ATTITUDES AND BEHAVIOURS IN IRELAND

PUBLISHED NOVEMBER 2026

REF: 7817-2025



Everyday habits, value and trust shape brand opportunities



Everyday sustainable behaviour

72% buy fewer products and make them last, while 67% repair rather than replace. Local, seasonal food attracts broader participation than plant-based eating.

Brands can build on these habits with durable products and support for repair and reuse.



Beyond premium shoppers

39% are willing to pay more for sustainable brands, rising to 55% among under-35s. However, DE consumers report more repair and second-hand buying than AB consumers.

Brands can broaden access through everyday prices and clear product value.



Credible brand leadership

68% expect brands to help them be more sustainable, and 57% prefer transparent brands. 53% would strongly consider switching if they suspected greenwashing.

Brands need to provide useful guidance and specific claims backed by evidence.

Repair and longer product life are already everyday habits

Already doing (% of applicable adults)



Buying fewer products and making products last longer

72%



Repairing products instead of replacing them

67%

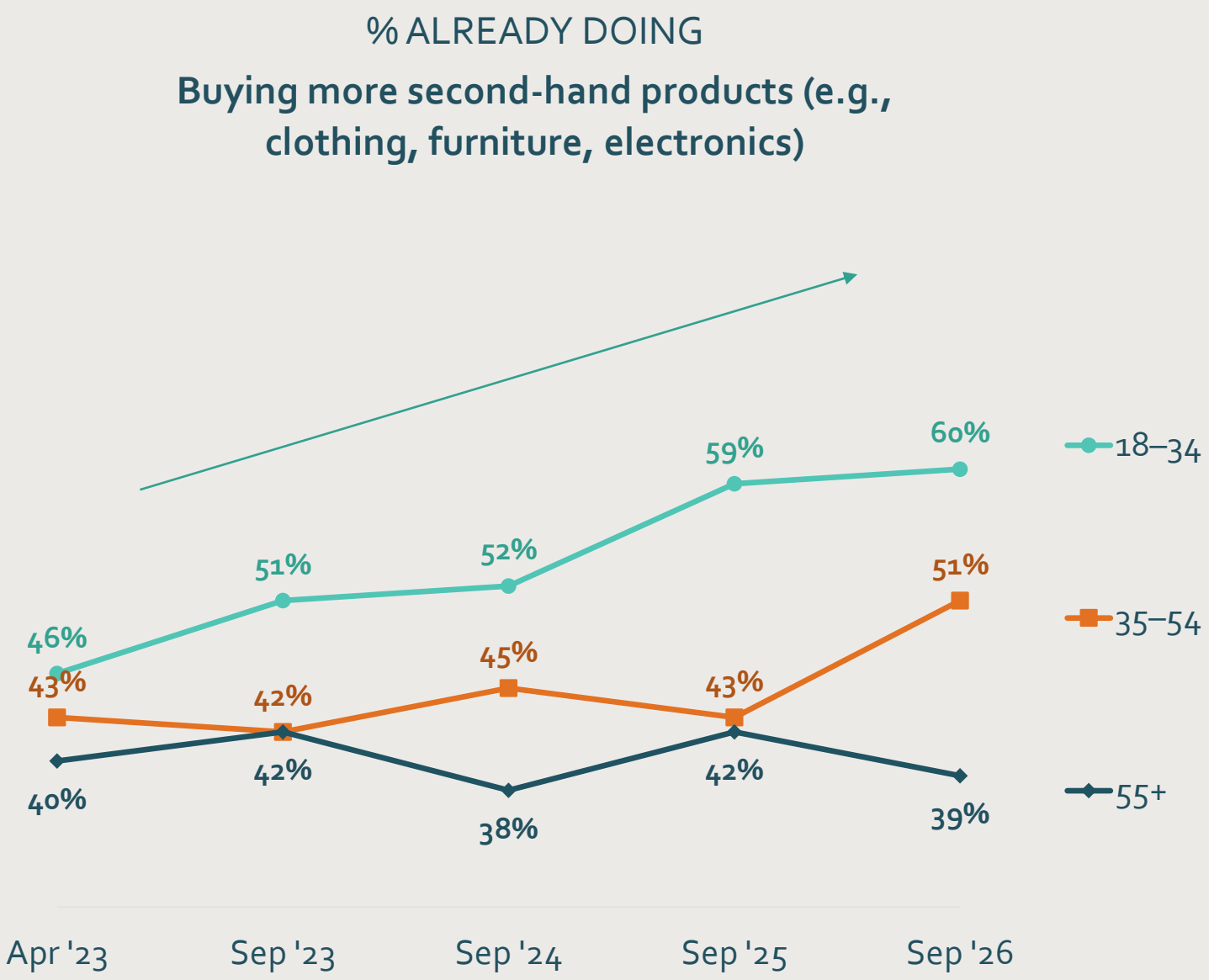


Choosing products with minimal packaging

63%

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: all adults aged 18+ excluding those not applicable for each activity)

Second-hand buying is growing among 35–54s, with 18–34s still leading when it comes to this thrifty behaviour



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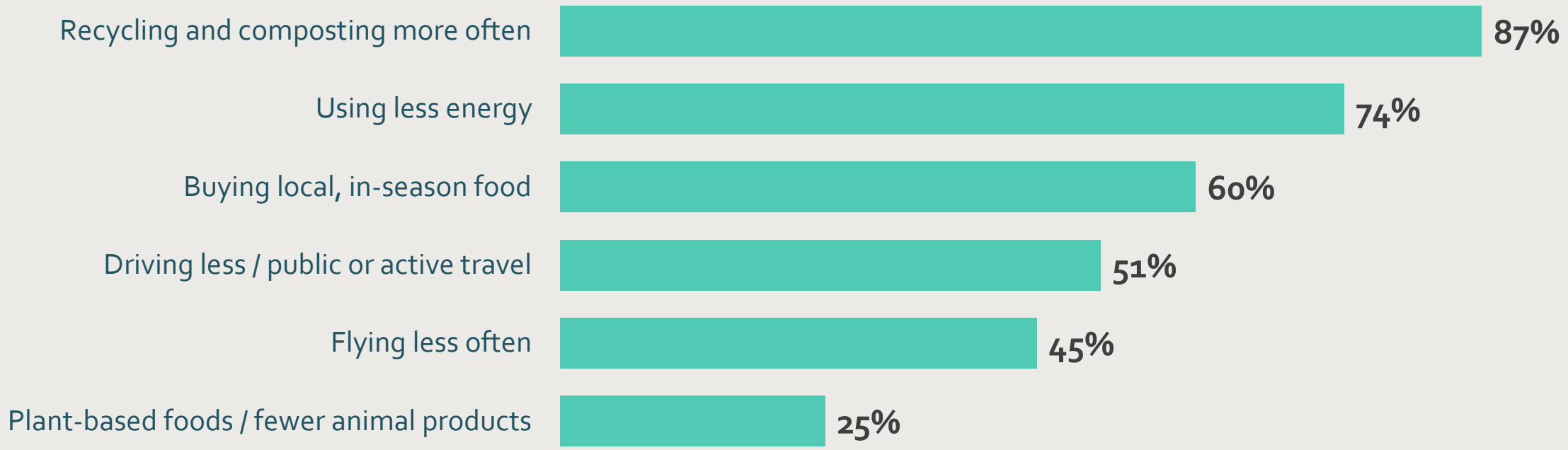
Recycling and energy saving lead for current sustainable behaviours

Brands can support widely adopted habits while recognising that others such as plant-based food consumption is more niche.

Already doing (% of applicable adults), Sep '26

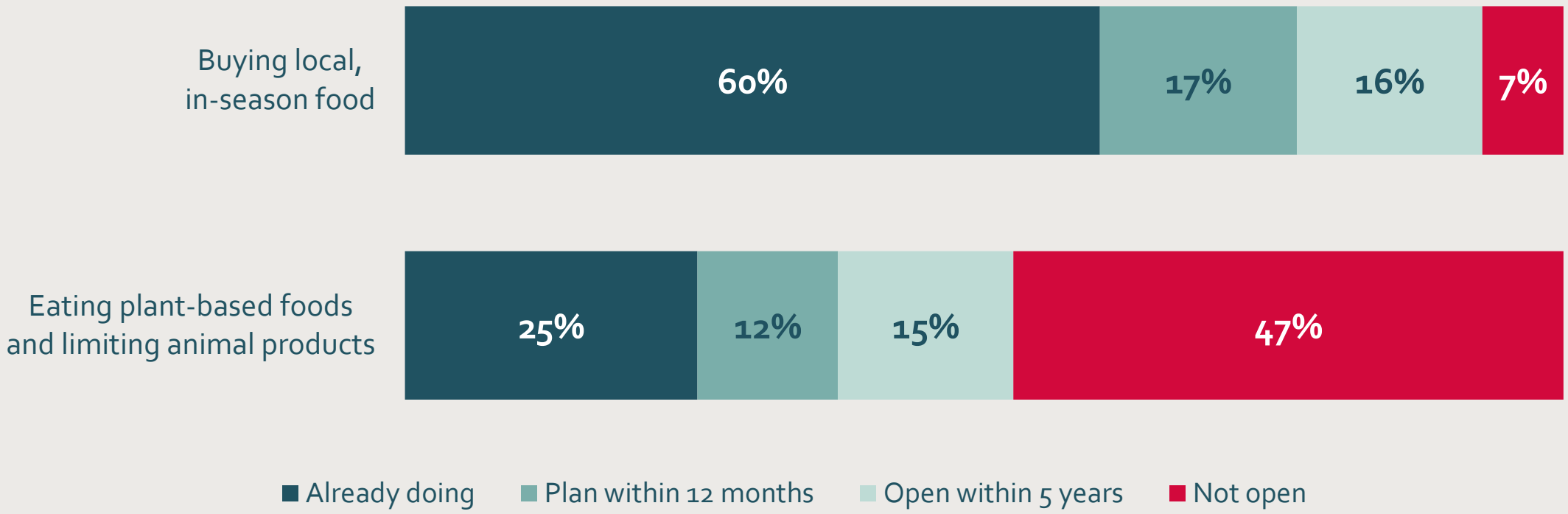


Q7. September 2026.
Base: adults 18+, excluding 'not applicable' for each action.

Local, seasonal food resonates more than plant-based eating

Local and seasonal ranges offer a way to support an existing habit. Plant-based products face greater resistance, making it important to understand barriers before choosing the message.

Current behaviour and future openness (% of applicable adults), Sep '26



Q7. September 2026. Base: adults 18+, excluding 'not applicable' for each action

Everyday sustainable habits sit alongside continued environmental concern

This suggests brands can build on familiar habits by making repair and reuse easier. Clear guidance on reducing waste and getting more value from products can help connect environmental concern with everyday choices.



Two in three believe their actions can help the environment

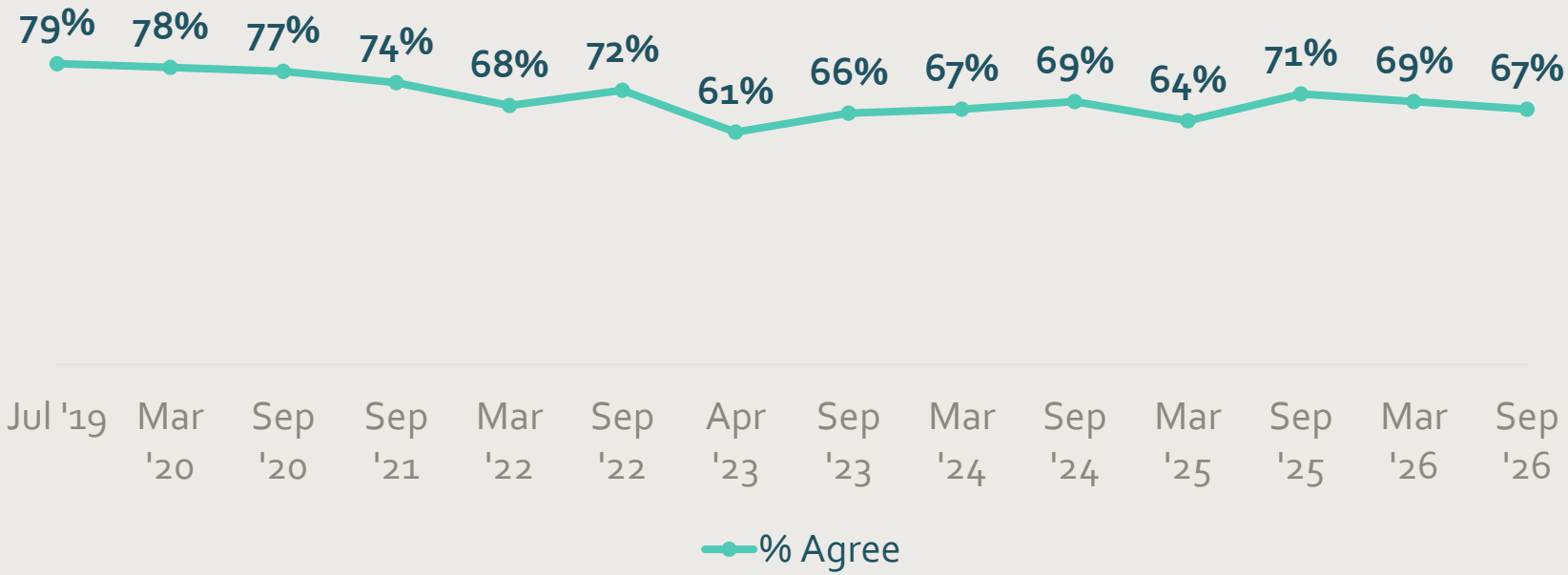
67%

I believe my personal actions can improve the environment

Total agree, Sep '26

47% somewhat 20% strongly

Agreement over time (% of adults)



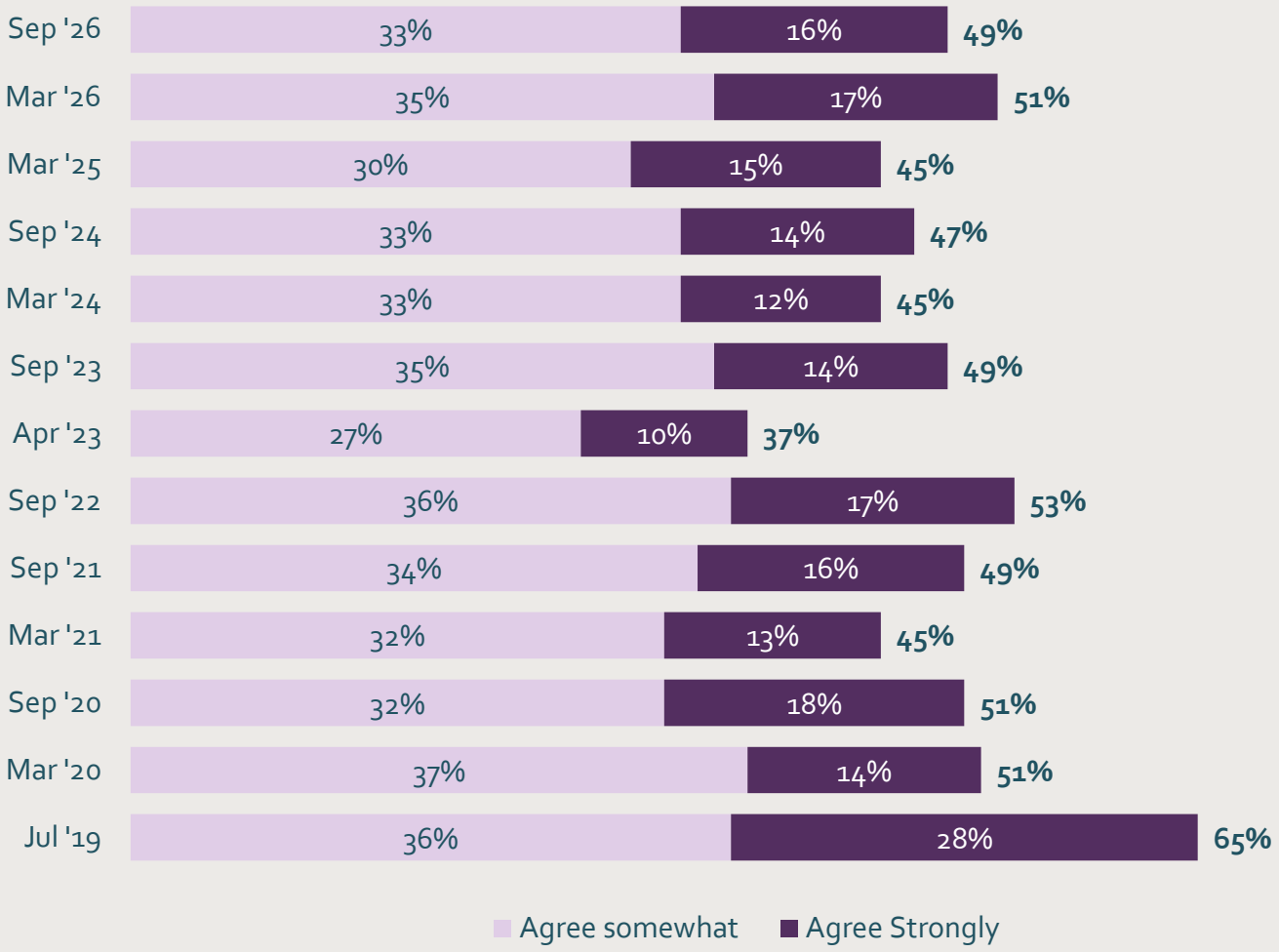
Two-thirds of consumers believe their own actions can make a difference to the environment. While there has been a modest decline among under-35s, they remain the group most likely to believe in the power of individual action, highlighting an ongoing willingness among younger consumers to engage with sustainability initiatives.

▲▼ Indicates significant difference vs Mar '26

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+)

Almost half feel environmental problems affect their lives today



Environmental problems have a direct effect on my life today

Close to half of consumers still feel environmental problems have a direct impact on their daily lives. This reinforces the reality of climate-related issues for many households.

▲▼ Indicates significant difference vs Mar '26

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 this means for brands...

Sustainable action is already part of everyday life.

Help consumers use less and make products last longer

How? Prioritise durability and practical support for repair and reuse.



Willingness to pay a sustainability premium is mostly being maintained

Around four in ten are willing to pay more, but willingness among adults aged 55–64 has fallen by 11 percentage points since September 2025.

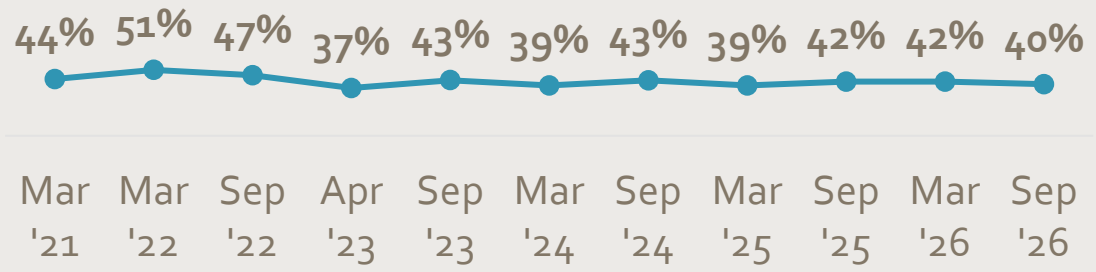
40%

Specifically seek out sustainably sourced or produced products

39%

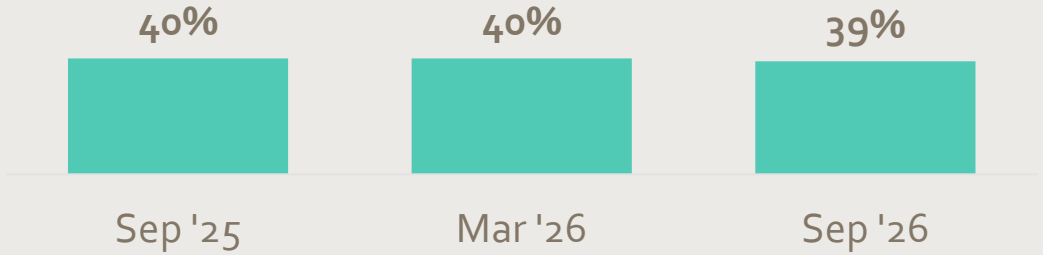
Willing to pay more for brands with strong sustainability practices

Seeking sustainable products (% agree)



Willing to pay more over time (% agree)

Declining steadily amongst those aged 55-64 (-11% vs Sep '25)



Q1 NET agree. Base: all adults aged 18+ and social grade AB. Premium question first asked Sep '25.

Source: RED C weighted tables, Sep '25, Mar '26 and Sep '26. Seeking-products trend retained from report.

Younger consumers are more willing to pay a sustainability premium



+7% vs All adults

- Environmental problems have a direct effect on my life today



+12% vs All adults

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



+14% vs All adults

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



+16% vs All adults

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

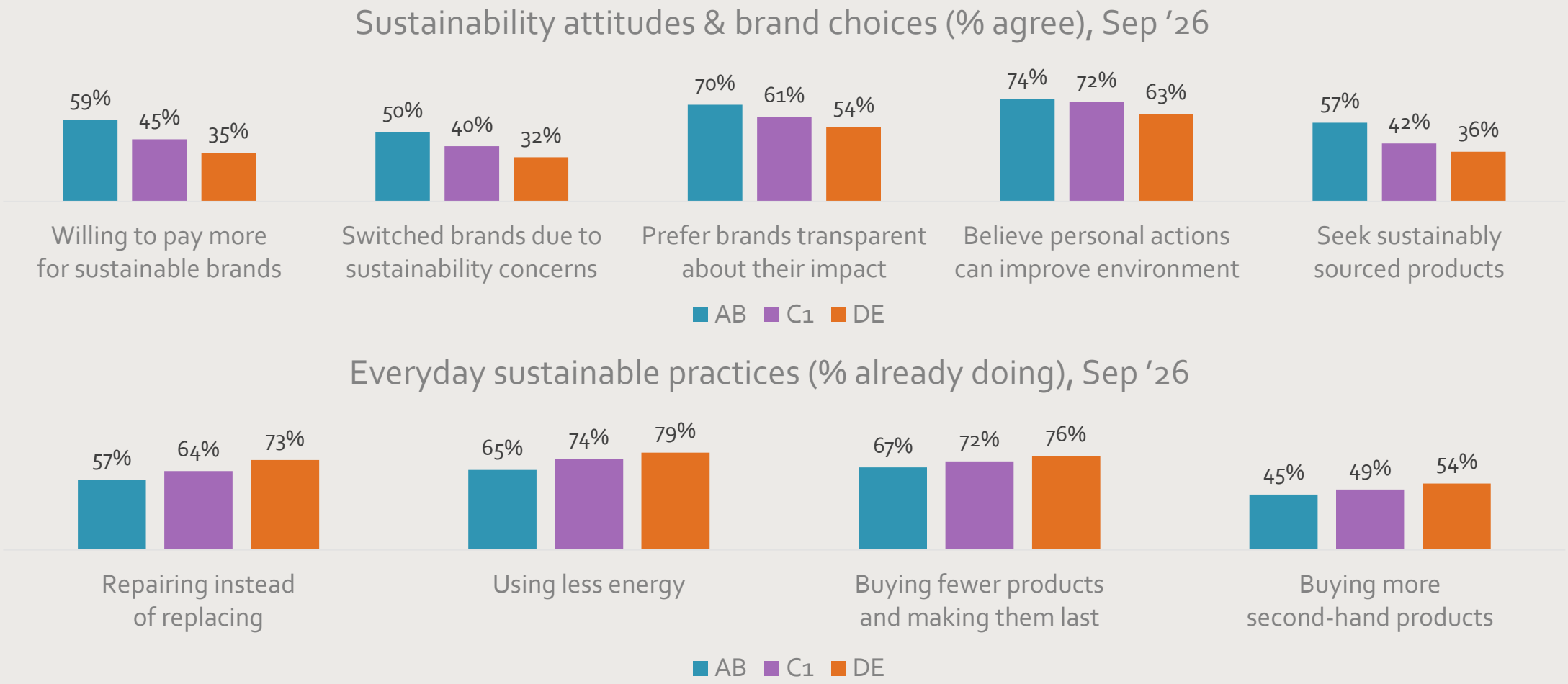
REDC

(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+)

The sustainability opportunity extends beyond premium shoppers

DE consumers are less willing than AB consumers to pay more for sustainable brands, yet more likely to report repairing products and buying second-hand. This suggests an opportunity for brands to make sustainable choices more accessible to all consumers.



Top: all adults 18+. Bottom: excludes not applicable for each activity. Source: Sep '26 weighted tables.

What this means for brands

39% are willing to pay more, rising to 55% among younger consumers.

Make sustainable choices accessible at everyday price points

Show the everyday value alongside the environmental benefit.



Consumers want brand guidance they can use to make sustainable choices.

Clear information on environmental impact and practical advice can help brands respond to these expectations.



68%

expect brands to lead them toward sustainable choices

3 in 4

of **under 35s (76%)** are expecting guidance from brands



Nearly

3/5

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

Brands can respond with clear evidence of their impact, explaining progress openly and acknowledging where there is still work to do.



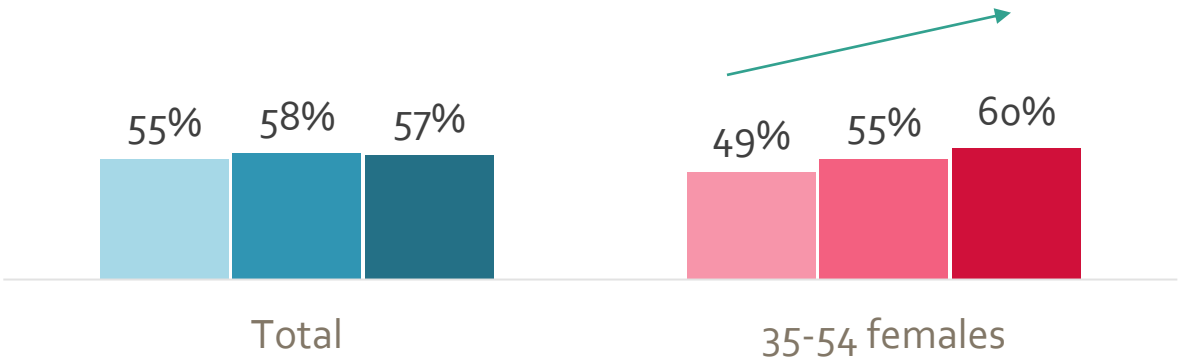


Nearly

3 in 5

prefer to buy from brands that are transparent about their environmental and social impact. This is increasingly the case amongst 35-54 women.

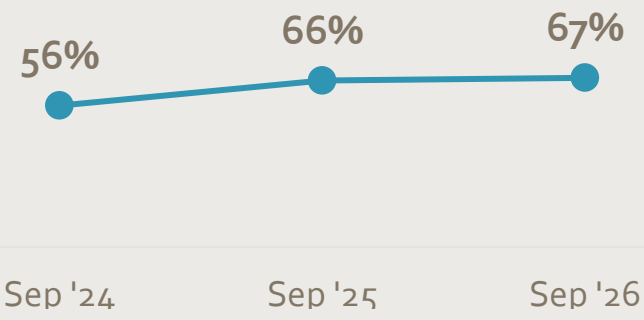
Brands can respond with clear evidence of their impact, explaining progress openly and acknowledging where there is still work to do.



46%

would like to see influencers promoting sustainable products more

This has been gradually growing among **under 35s**



Consumers' willingness to switch raises the stakes for credible sustainability claims

This suggests brands need to make sustainability claims specific and easy to verify. Clear evidence of progress, alongside honest acknowledgement of limitations, can help consumers judge whether a brand's actions match its promises.



Over

1 in 3

have switched products or brands due to sustainability concerns

Among **under 35s** this is…

1 in 2



53%

would strongly consider switching brands if they suspected them of greenwashing

Men

57%

Women

49%



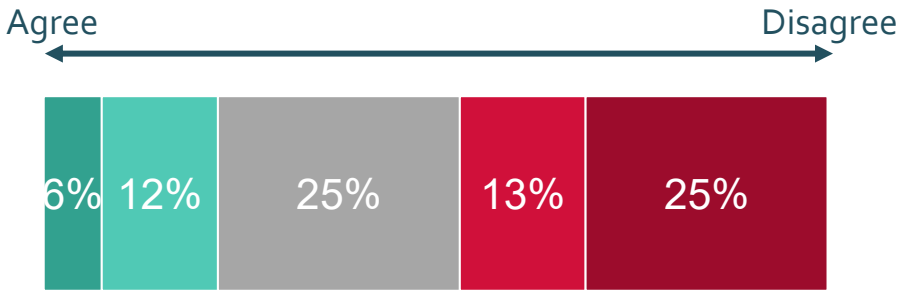
Uncertainty over AI's benefits



Only

18%

Believe the environmental benefits of artificial intelligence (AI) will outweigh its environmental costs



However, 1/5 are unsure of the environmental benefits and costs

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What this means for brands

Consumers expect guidance and scrutinise brand claims.

Make the benefit clear.
Back every claim
with evidence.

Give people simple guidance they can act on.



METHODOLOGY & ABOUT RED C

Methodology

- n=1,011 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 15th wave of the RED C Sustainability Monitor and fieldwork was conducted between 18th – 23rd September 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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