



UK Consumer Sustainability

March 2022
REDC

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1

Summary

1

People are more aware of how to live sustainably, but this is not resonating in their behaviours. Sustainability is therefore taking a back seat as the cost-of-living and energy crisis dominate society's agenda.

2

Those on the lowest incomes feel they cannot financially afford to make sustainable consumer choices and are in turn being locked out of living more sustainably.

3

However, 18–24-year olds are adopting more sustainable consumer behaviours compared to those 55+. They are more likely to actively look for sustainable products and services and holistically understand the correlation between war and sustainability. This suggests more work is needed to better target and educate those 55+.

4

The Russian invasion of Ukraine has accelerated movement towards renewable energy resources. Offshore wind/solar farms and retrofitting homes are the most desired avenues for investment among the UK population.

5

The energy crisis has also led to a longer-term movement towards nuclear power, but attitudes towards its usage are polarizing, with males and those 55+ being significantly more in favour of future investment verses younger, female populations.

6

Men are significantly more in favour of investment into electric car charging infrastructure compared to women who are more in favour of rewilding and the reduction of chemical pesticides/ fertilizer usage in agriculture.



2

Results



New research by the Trades Union Congress suggests energy bills are due to rise at least **14 times faster** than wages in 2022.

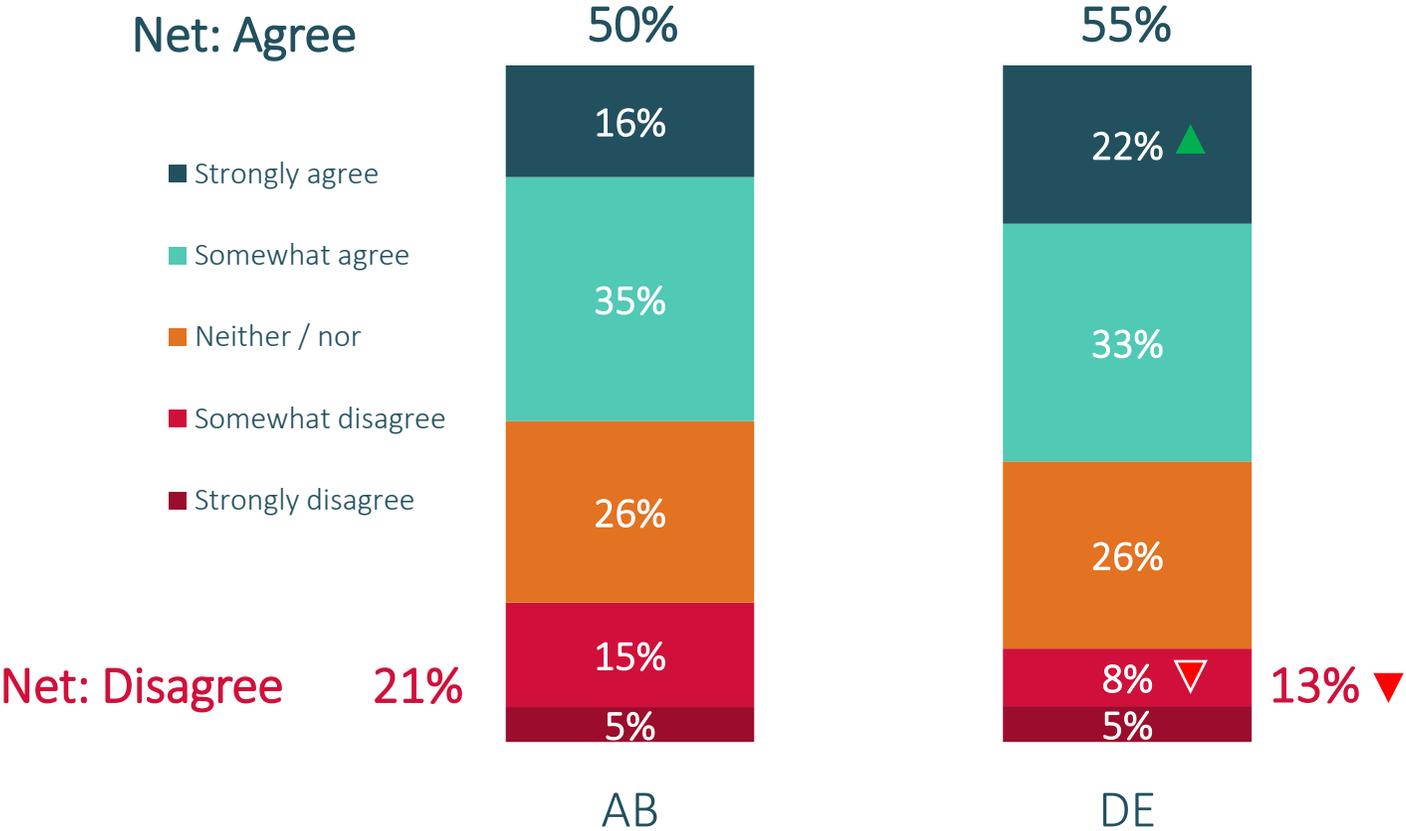
Those on low incomes are being hit the hardest, as the cost-of-living surges leading to the DE demographic feeling they are being locked out of living more sustainably.

Sustainability is taking a back seat as the rising cost of living limits consumer choice, particularly among the DE demographic



% Agree with statement

'I would like to live more sustainably, but I cannot financially afford to make the changes needed to do so'



DE are also significantly less likely to agree that they seek out products that are sustainably sourced/produced (30% of DE in comparison to 48% of AB).

Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?
 Base: AB (n=565), DE (n=487).

▲ ▼ Significant increase/decrease vs. AB

The cost of fuel has reached an all time high as the global energy crisis continues, putting many at risk of fuel poverty.

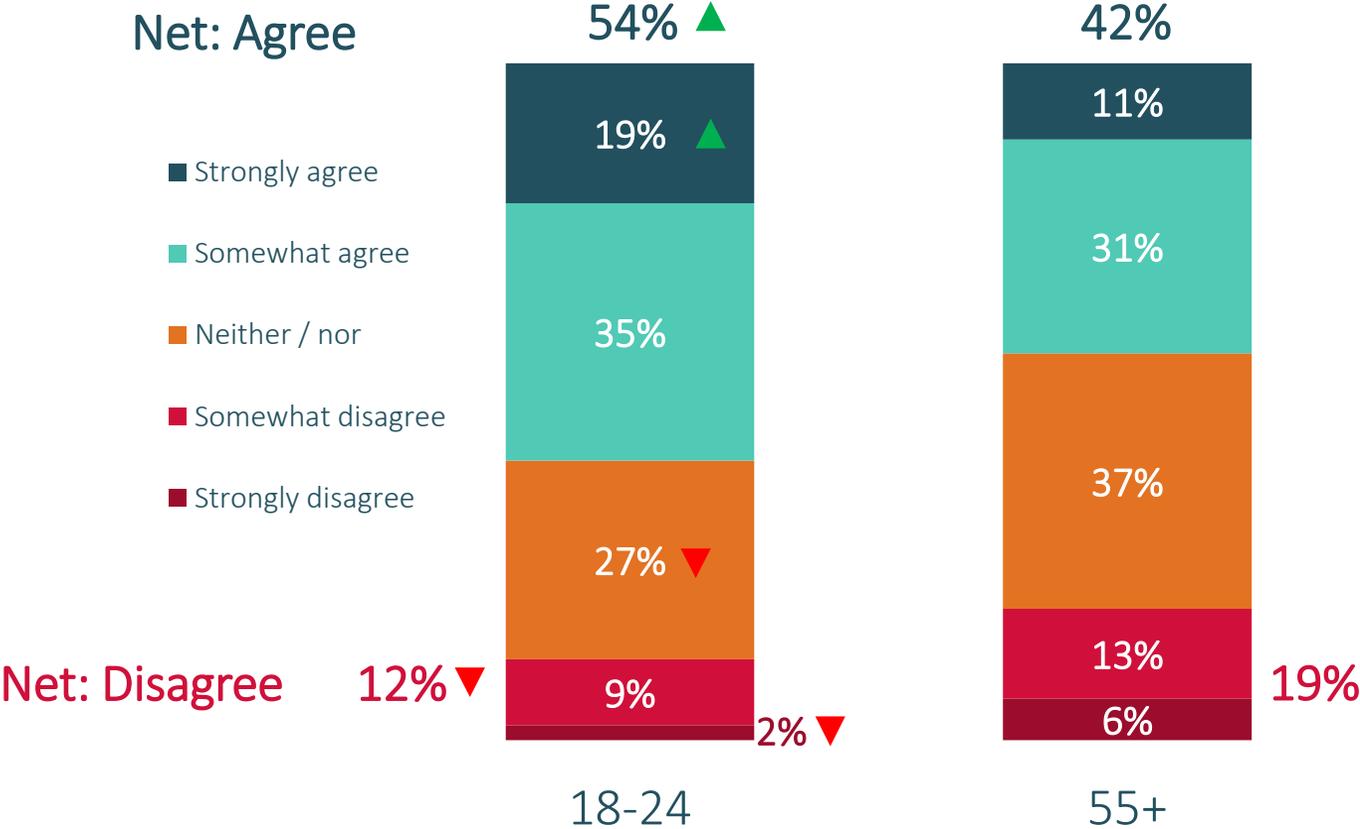
More recently, volatility in wholesale gas prices has been exacerbated by the Russian invasion of Ukraine, which, in turn, is having a knock-on impact on the rising cost of living.

However, rising fuel prices are causing young people to look for more sustainable options



% Agree with statement

'With cost of fuel rising, I am looking for more sustainable options'



Although 18–24-year-olds are significantly more likely to agree that cost is a barrier to sustainability (57% vs 45% of 65+), rising fuel prices is causing them to look for more sustainable options (54% agree in comparison to 42% of 55+).

Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?
 Base: 18-24 (n=223), 55+ (n=796).

▲ ▼ Significant increase/decrease vs. 55+



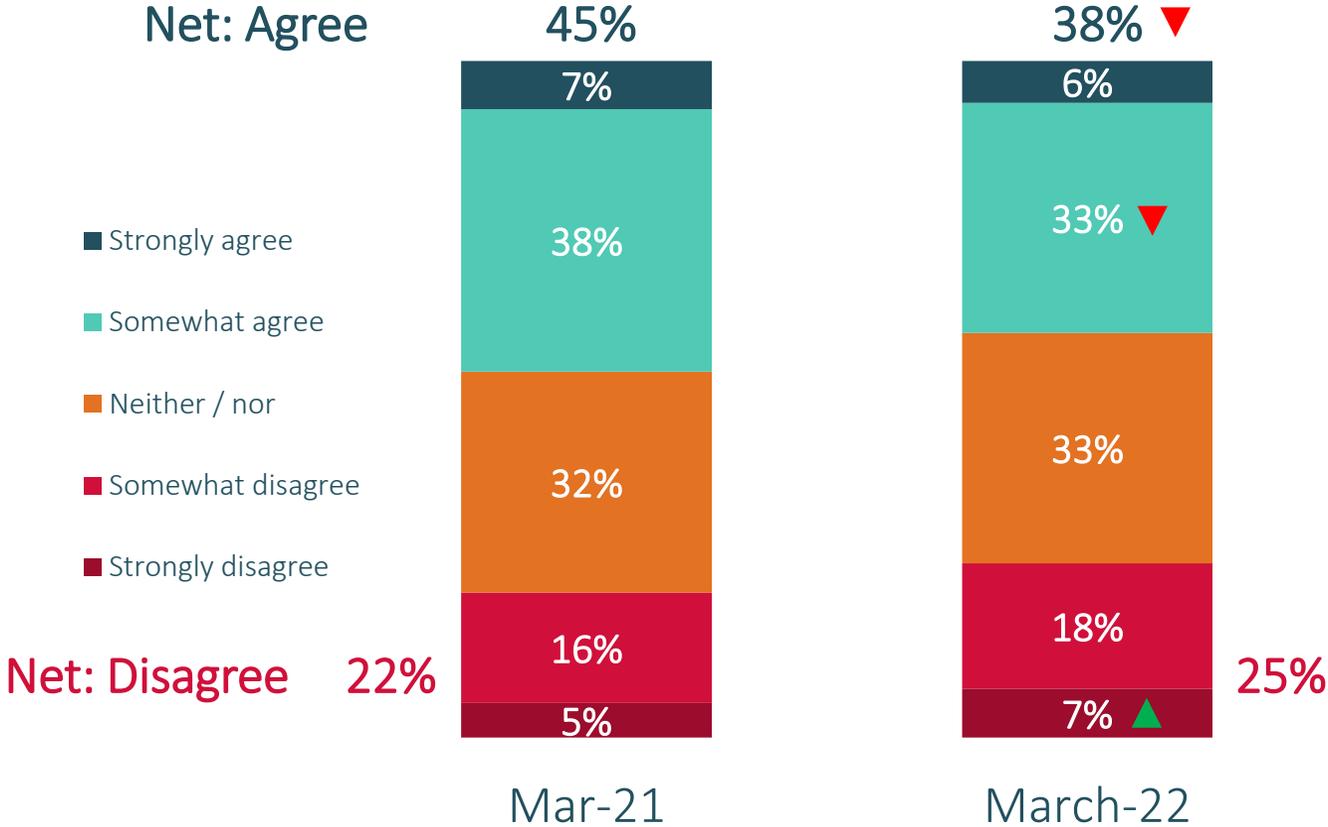
Recent geopolitical events such as the ongoing War in Ukraine and its impact on the wider cost of living crisis, have dominated news coverage.

Therefore, how do we keep sustainability as a top-of-mind priority for people when it is less frequently part of the news cycle?

Year on year, fewer people are reporting being unsure how to live more sustainably

% Agree with statement

'I would like to live more sustainably, but I'm not sure how'



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?
 Base: All respondents March 2021 (n=1,086), March 2022 (n=2074)

▲ ▼ Significant increase/decrease vs. March-21

However, despite increasing global weather events, significantly fewer people are changing their behaviors



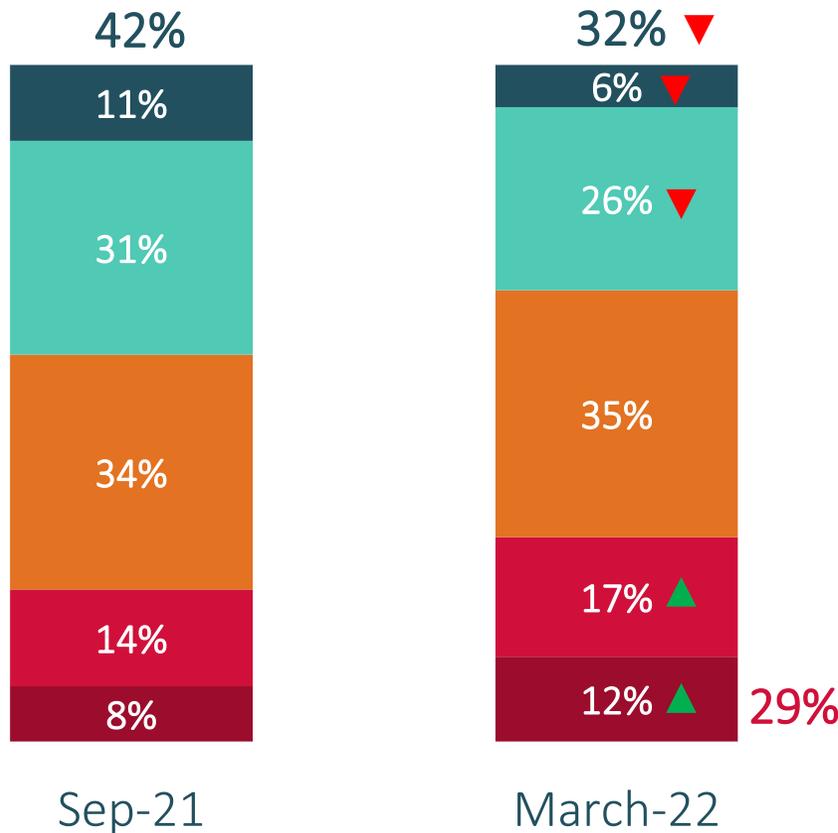
% Agree with statement

'The reporting of extreme global weather events has prompted me to change my behaviour in the past 6 months and live more sustainably'

Net: Agree

- Strongly agree
- Somewhat agree
- Neither / nor
- Somewhat disagree
- Strongly disagree

Net: Disagree 22%



In the past 6 months there has been a significant decline in those agreeing they have been prompted to adopt more sustainable behaviors as a result of extreme global weather events.

This suggests that other societal issues, particularly the rising cost of living and energy crisis are seen as more pressing for society.

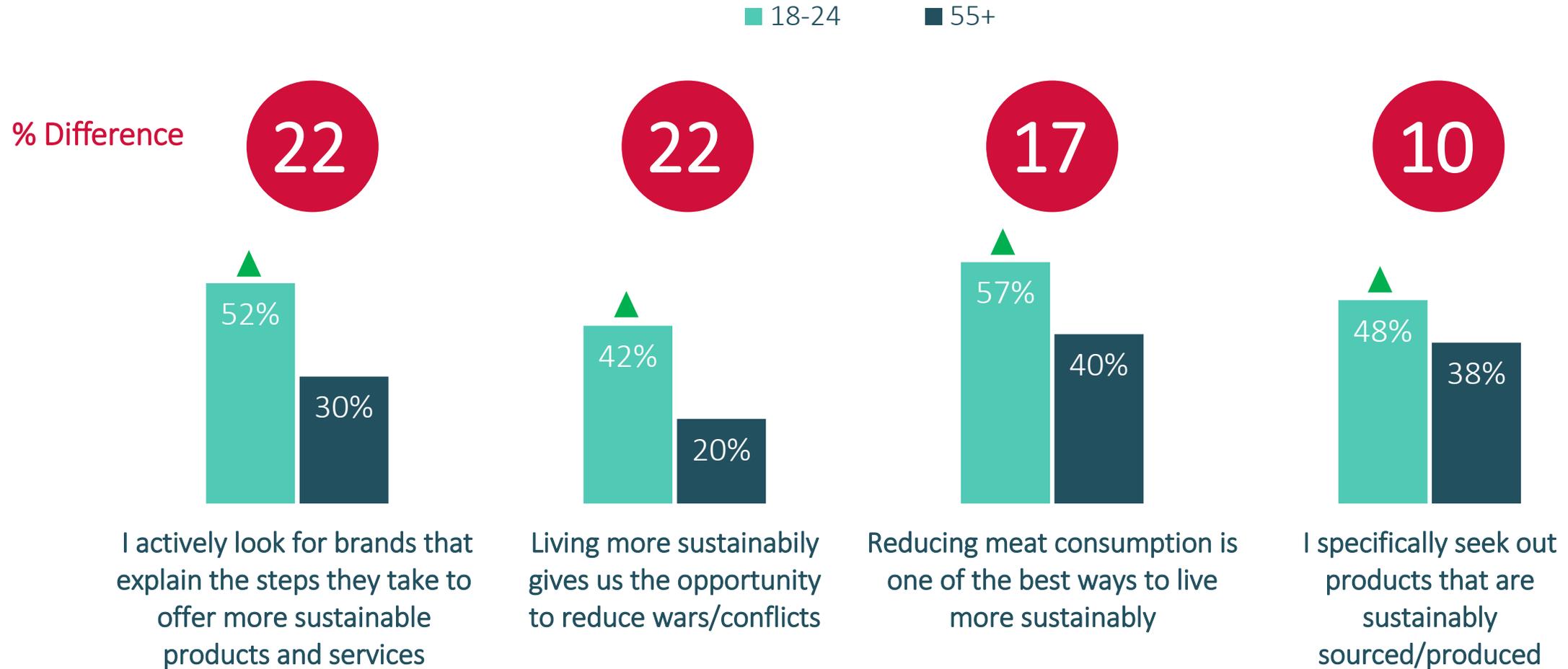


Twice as many 18–24-year-olds believe living more sustainably reduces war and conflict than those aged 55+

There is a distinct split between age and sustainability, with Gen Z actively being more climate conscious than those 55+



% Agree with statement



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment? Base: 18-24 (n=223), 55+ (n=796).

▲ ▼ Significant increase/decrease vs. 55+

The Russian Invasion of Ukraine and the sanctions imposed by the West on Russia, a major oil and gas supplier, has prompted a reshaping of European energy policy.

One of the strands focusses on an acceleration towards renewable energy sources to strengthen energy security.

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



% Would like to see investments focused on...

40% 

Offshore wind/
solar farms

31% 

Retrofitting homes
(i.e. heat pumps,
insulation, window
glazing upgrade)

26% 

Onshore wind/
solar farms

25% 

Public
transportation

24% 

Rewilding (i.e. restoring
and protecting natural
processes and
wilderness areas)

23% 

Electric car charging
infrastructure

21% 

Nuclear energy
generation

21% 

Native tree
growth

20% 

Shifting away from
using chemical
pesticides/fertilisers in
agriculture

9% 

Upgrading
Victorian sewers

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

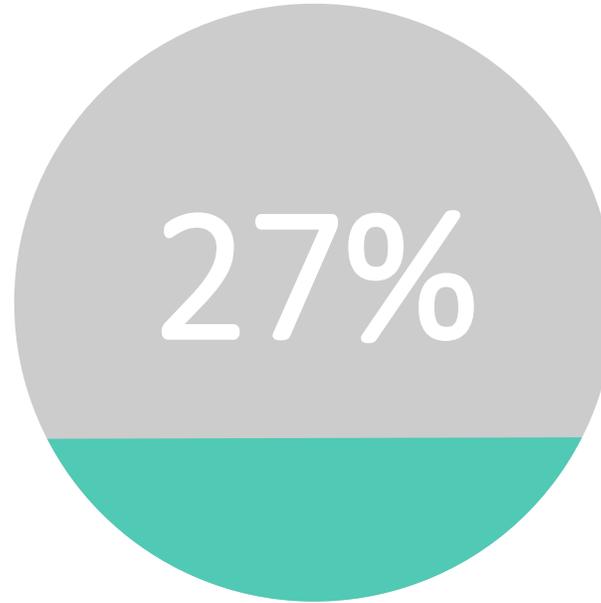
(Base: all UK adults aged 18+ n= 2074)



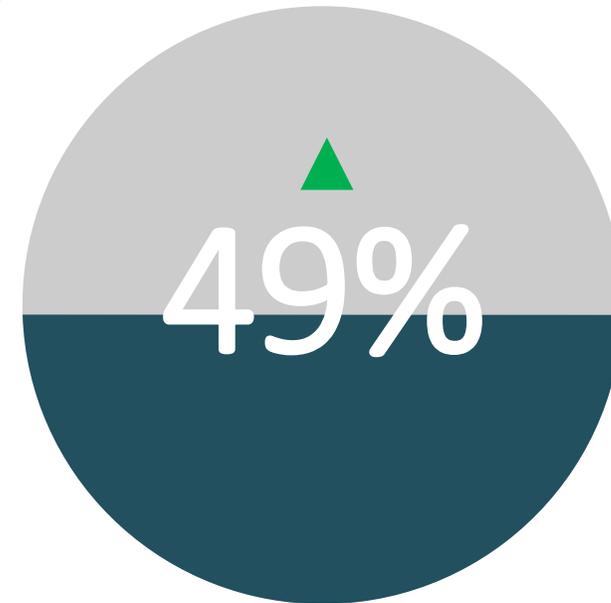
But some disparities in public opinion persist...

Investment in offshore wind/solar farms is driven by those 55+, with Gen Z being significantly less in favour

% Would like to see investments focused on offshore wind/solar farms



18-24



55+



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

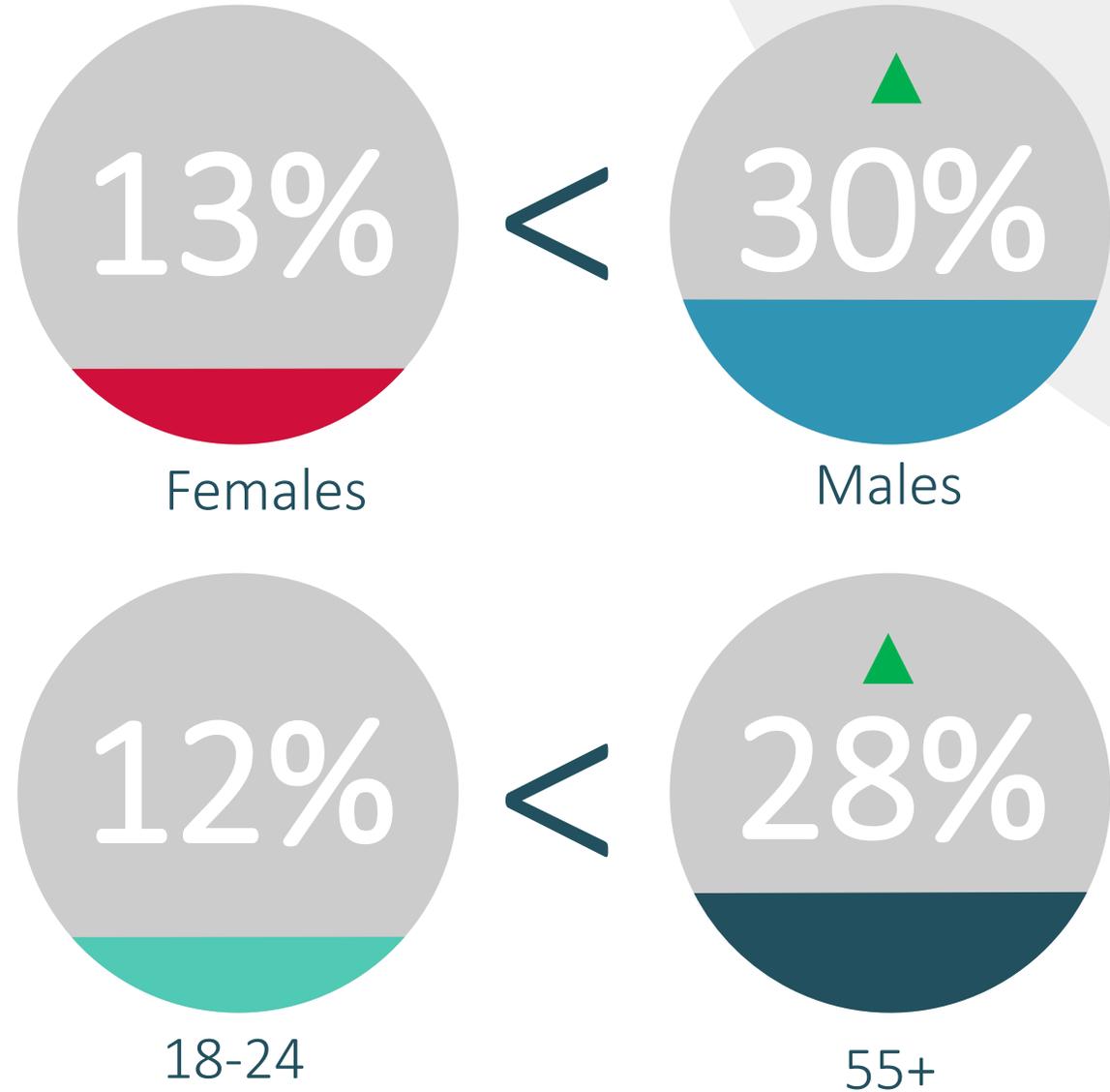
Base: 18-24 (n=223), 55+ (n=796).

▲ ▼ Significant increase/decrease vs. 18-24



Attitudes towards nuclear power investment in the UK are also polarizing, with males and those 55+ significantly more in favour verses females and those 18-24

% Would like to see investment into Nuclear energy generation



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: 18-24 (n=223), 55+ (n=796), Females (n=1081), Males (n=987).

Males would further like investment in electric car infrastructure while females are more in favour of rewilding and chemical reduction in agriculture

% Would like to see investments focused on...



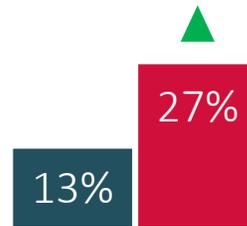
■ Males ■ Females

% Difference

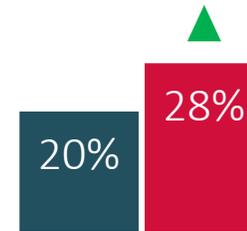
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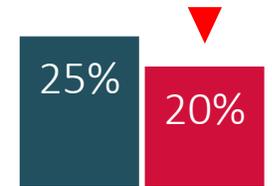
5



Shifting away from using chemical pesticides/fertilisers in agriculture



Rewilding (ie restoring and protecting natural processes and wilderness areas)



Electric car charging infrastructure

▲ ▼ Significant increase/decrease vs. males

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: Males (n=987), Females (n=1081).

Recommendations



1



The 18-24 age group is a key audience brands need to engage their sustainability messaging with. This could be done by adapting their products and marketing strategy to acknowledge the power and importance of sustainability to this subgroup.

2



Brands need to look at a plethora of sustainable practices and energy resource adoption, rather than a select few, in their journey towards a sustainable future.

3



When eating out, 58% of UK consumers report choosing plant-based or vegetarian options: sometimes, often or always. (*Nestle Professional*). This shows that sustainable eating is a big opportunity for food brands to capitalize upon, particularly among the 18-24 age group as this report has highlighted.

4



EV sales now outnumber those of diesel cars across Europe as registrations decline by a further 18% year on year (Jato Dynamics). This demonstrates the pioneering movement towards EV adoption. Our results further support this by showing continued growth of EV, favoured particular among the UK male population.