



UK Consumer Sustainability

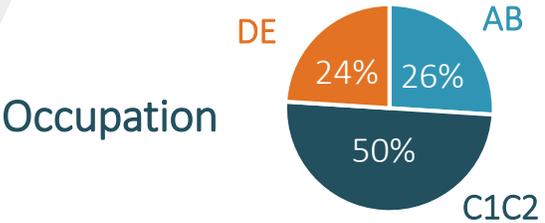
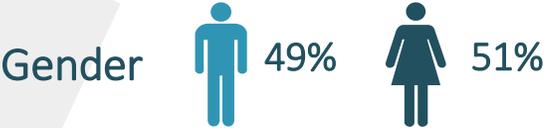
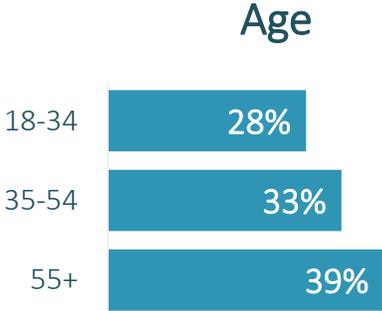
October 2022
REDC



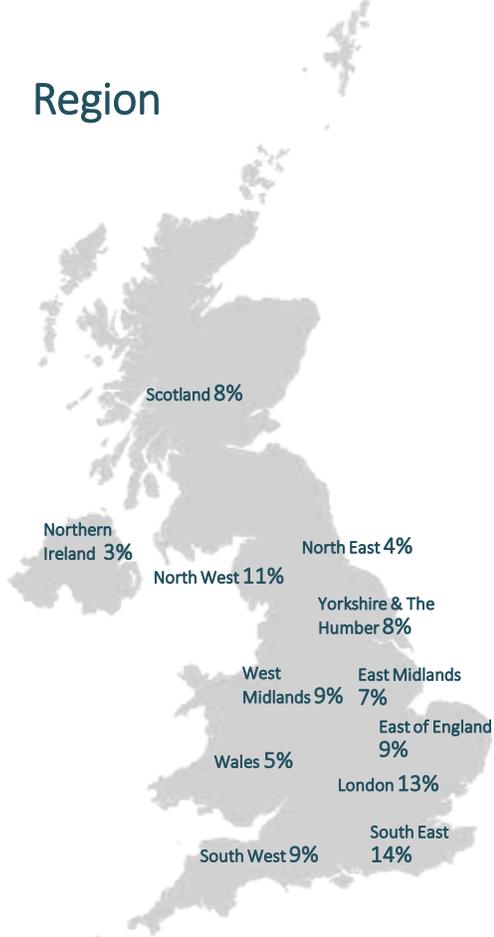
Sample and methodology



- Online Survey among a Nat Rep Sample of N=2,078 UK Adults
- Fieldwork conducted: 21st – 22nd September 2022
- 2 questions



Region



1

Summary

RED C Sustainability Tracker Wave 6 – Key Headlines



The cost-of-living crisis has transcended social grade and is now impacting those at the wealthiest end of the spectrum



8 in 10 agree energy producers should pay more tax to support the British government in its efforts to shelter households from rising energy bills



Sustainable consumer behaviours have previously been driven by ABC1's, however reduced disposable incomes are limiting even their ability to make more sustainable choices



While 25-34's are the most educated about sustainability, they are being hit hardest by the cost-of-living-crisis which is impeding on their efforts to live more sustainably



2

Sustainable Attitudes & Behaviours



The **'Cost Of Living Crisis'** refers to the fall in 'real' disposable incomes (adjusted for inflation and tax) .

A rapid **increase in energy costs**, particularly wholesale price of gas, has been a key driver for this increase in inflation.

The **Global Coronavirus Pandemic** and **Russian invasion of Ukraine** have also significantly exacerbated economic stresses.

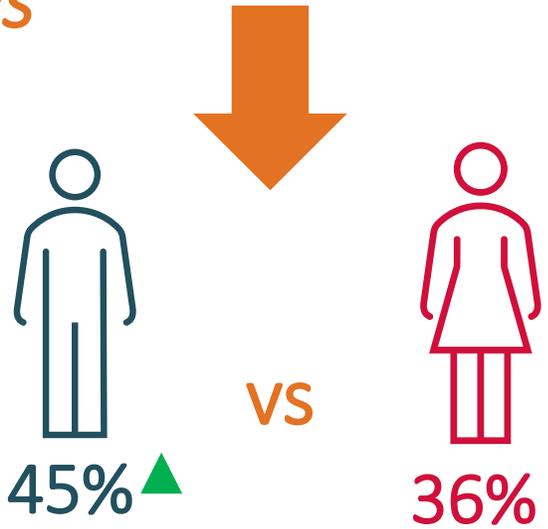
As witnessed in March 2022, **Sustainability continues to take a back seat as the cost-of-living crisis dominates public concern.**

Energy security concerns are diverting attention from environmental issues

This is driven significantly by males

40%

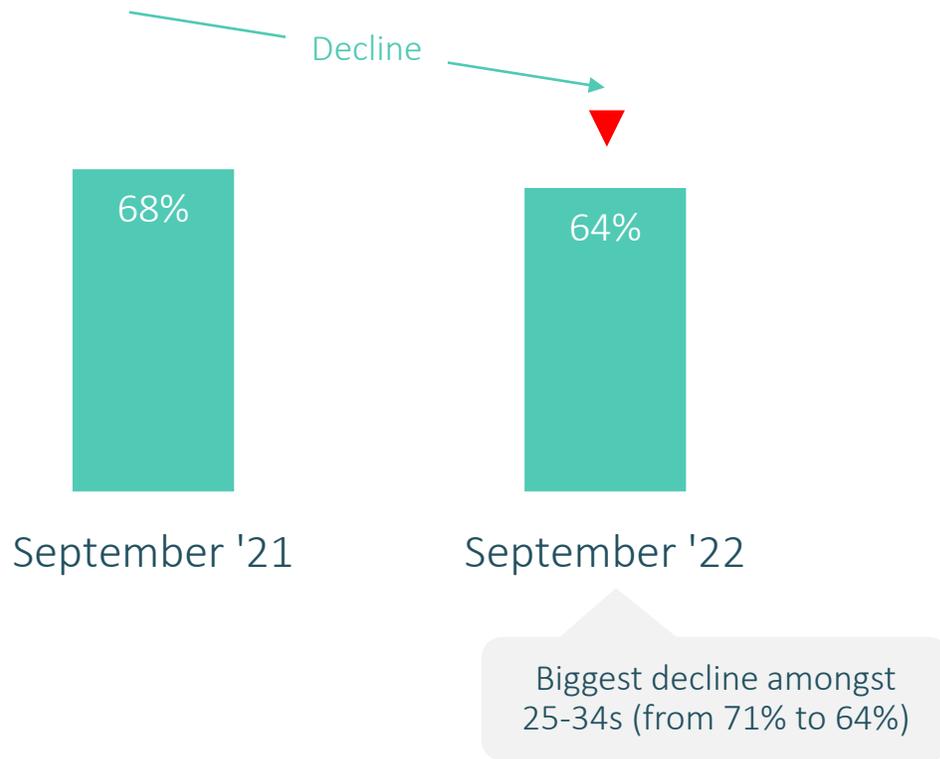
Of people in the UK believe the UK's energy security is more important than environmental issues



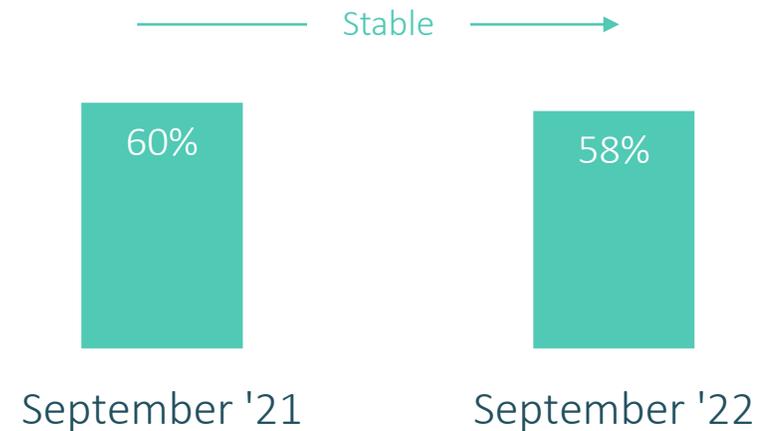
Q6. Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each. Base: All respondents Sep'22 n=2078, All Males Sep'22 (n=1010), All Females Sep'22 (n=1060)

YOY, there has been a significant decline in the belief that personal actions can improve the environment

'I believe my personal actions can improve the environment'
(T2B Agree)



'There is still time left for us to reverse the effects of global climate change'
(T2B Agree)



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?/
Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each. / Base: All respondents September '21 n=2,126, September'22 n=2,078



However, this attitude is not linked to a lack of education as **more than 6 in 10 have a good understanding of what it means to live more sustainably (64%)**

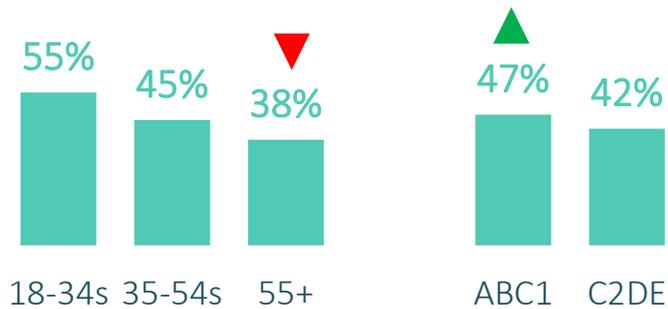
18-34's and ABs continue to drive sustainable behaviours in the UK

Just under 1 in 2 18-34's specifically seek out products that are sustainably sourced/produced and have been prompted to change their behaviour in the past 6 months to live more sustainably

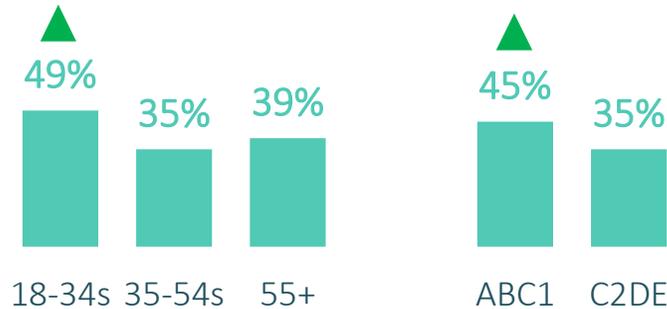
T2B Agree



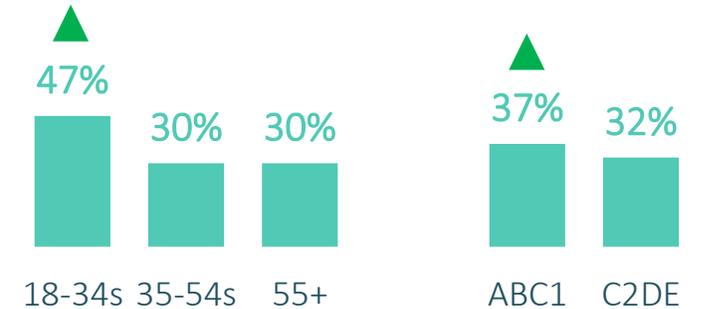
'With cost of fuel rising, I am looking for more sustainable options'



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



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



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: All respondents September'22 n=2,078, 18-34s n=562, 35-54s n=680, 55+ n=836, ABC1 n=1,132, C2DE n=946

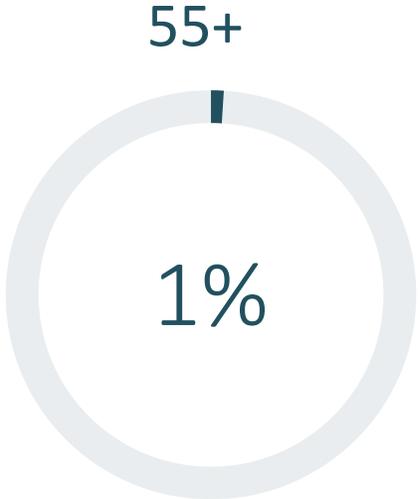
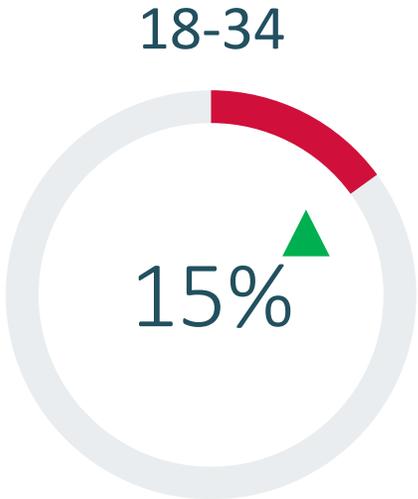
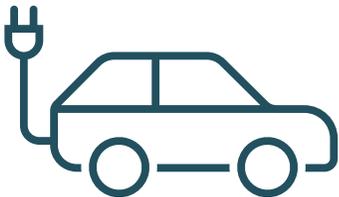
  Significantly up/down vs other groups @95%

18-34's are also most likely to own an electric car or plan to get one within the next 2-3 years

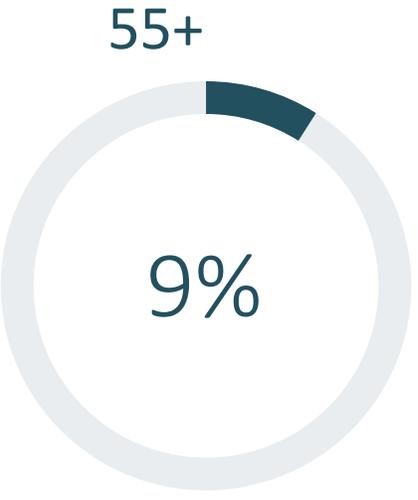
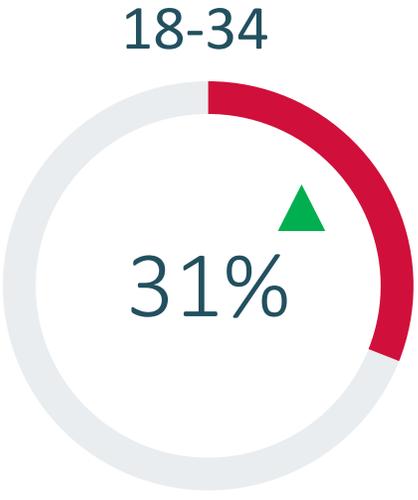


T2B Agree

"I currently own an electric-only car (either new or used)"



"I plan to get an electric-only car (either new or used) within the next 2-3 years"



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?
Base: All 18-34 's Sep'22(n=562, All 55+'s Sep'22 (n=836)

▲ ▼ Significantly up/down vs. other groups @95%

3

Cost of Living, Health & Sustainability





1 in 2 people in the UK are concerned about **their own or their families physical and/or mental health** as a result of rising energy bills (50%)

Women and DE's are the most concerned about the impact of rising energy bills on their health and wellbeing

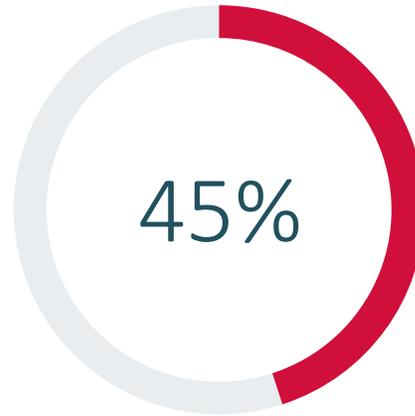
T2B Agree

"I am concerned about my or my family's physical and/or mental health as a result of rising energy bills"

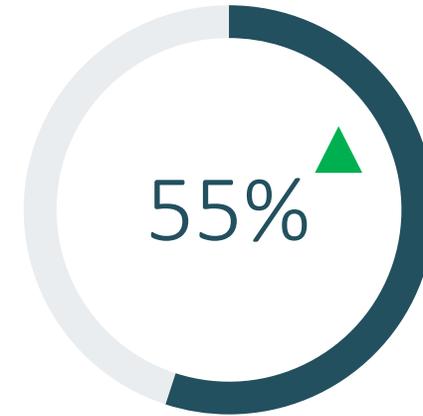


"I fear I will not have enough money to adequately feed myself or my family as a direct result of rising energy bills "

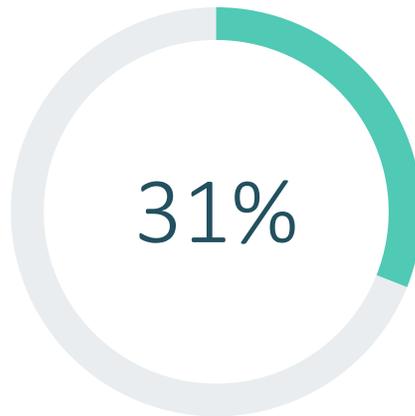
Male



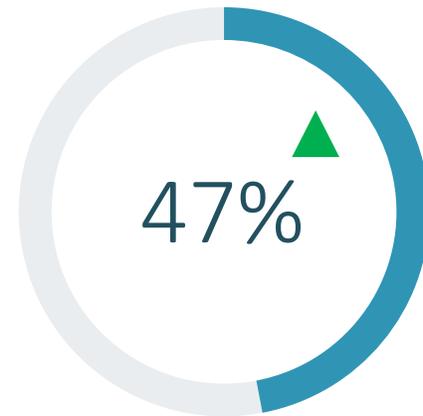
Female



AB



DE



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?/ Q6.Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each. Base: All Males Sep'22 (n=1010), All Females Sep'22 (n=1060), All AB's Sep'22 (n=572), All DE's Sep'22 (n=507)

Significantly up/down vs. other groups @95%

Almost 1 in 2 women in the UK fear they will not have enough money to adequately feed themselves or their family as a direct result of rising energy bills (47%)

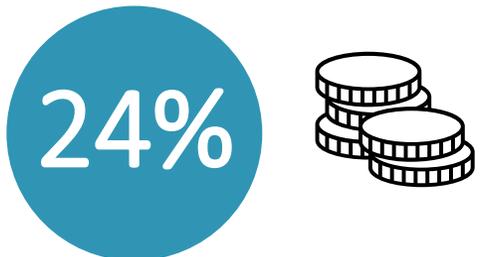
1 in 4 people in the UK are living less sustainably now that before the current cost of living crisis

T2B Agree

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



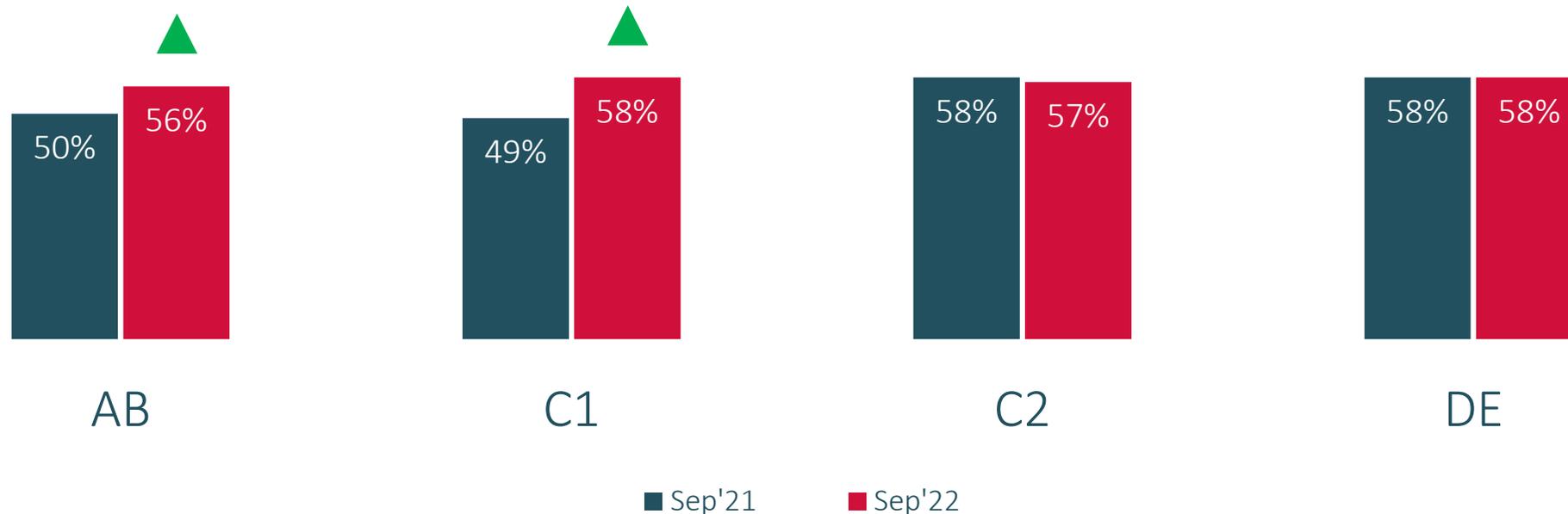
“I am living less sustainably now than I was before the current cost-of-living crisis”



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?/ Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each. Base: All respondents Sep' 21 (n= 2126), Sep'22 (n=2078)

YOY, the impact of the cost-of-living crisis is transcending across social group meaning the sustainability agenda is being compromised

“I would like to live more sustainably, but I cannot financially afford to make the changes needed to do so” (T2B Agree)



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?
Base: All AB's Sep '21 (n=574), All C1's Sep'21 (n=612), All C2's Sep'21 (n=429), All DE's Sep '21 (n= 511), All AB's Sep '22 (n=572), All C1's Sep'22 (n=560), All C2's Sep'22 (n=439), All DE's Sep'22 (507)

▲ ▼ Significant increase/decrease YOY @95%

The Cost Of Living has become **the leading concern among Gen Zs and millennials in 2022 in the UK**, overtaking climate change from 2021's top spot.

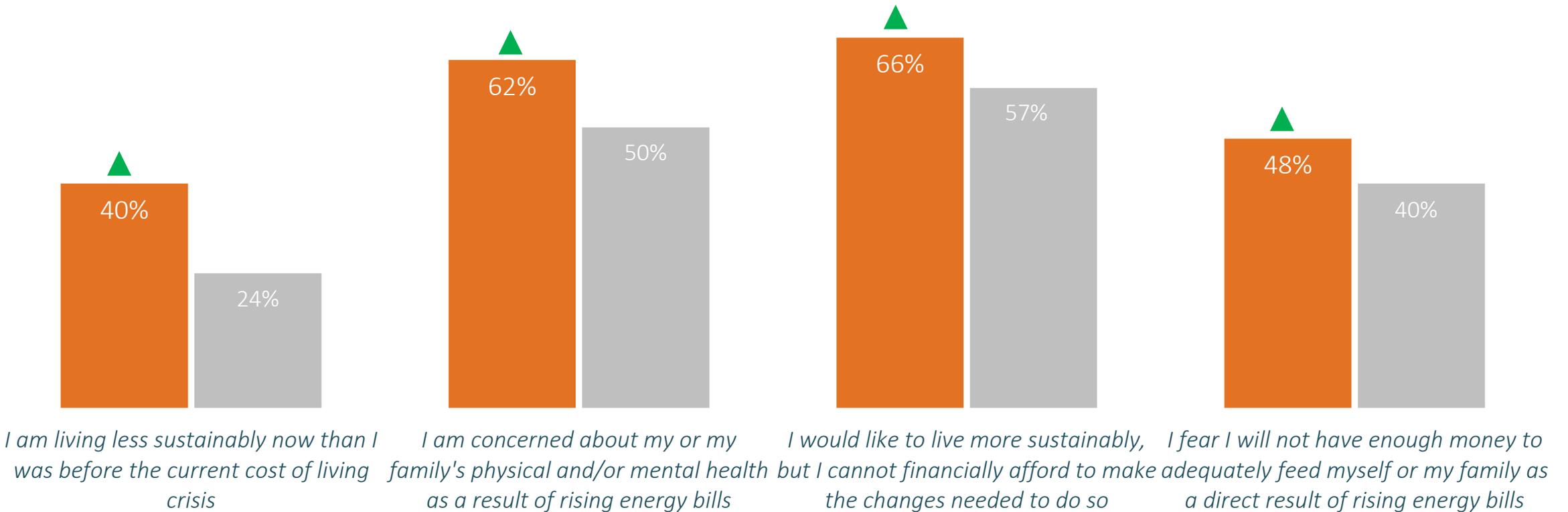
Half of UK Gen Z's and millennials **use all their monthly income on living costs**, whilst 2 in 5 have **taken on a side hustle to make ends meet**.

25-34's are the age group being hit hardest by the cost-of-living crisis, which is impeding on their efforts to live sustainably



T2B Agree

■ 25-34's ■ Total



Q1 How much do you agree or disagree with the following statements with regard to your personal views on the environment?/ Now looking at the following statements which others have made in relation to sustainability and energy, please select to what extent you agree or disagree with each.
 Base: All respondents Sep'22 (n=2078), All 25-34's Sep'22 (n=342)

▲ ▼ Significantly up/down vs Total Sample @95%

4

What Action is
Needed & By
Who?



7 in 10 people in the UK believe the current energy crisis demonstrates our **over-reliance on fossil fuels and the need to go renewable (69%)**



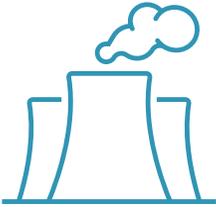
8 in 10 people in the UK agree energy producers should pay more tax to support the British government in efforts to help British households with their energy bills (79%)

Energy producers, business and government all have a role to play



55+ are significantly more likely to feel energy producers should pay more tax, while 18-34's are significantly more likely to agree action on climate change must come from business and government

T2B Agree



79% of people agree energy producers should pay more tax to support the British government in efforts to help British households with their energy bills



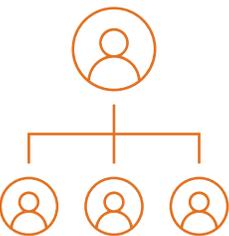
55+ (84%) ▲ vs 18-34 (72%)



63% of people agree the government should provide further grants for the retrofitting of homes



Male (67%) ▲ vs Female (60%)
AB (68%) ▲ vs DE (58%)



58% of people agree action on climate change must come from business and government as opposed to coming from individual citizens



18-34 (65%) ▲ vs 55+ (55%)

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▲ ▼ Significantly up/down vs other groups @95%

THANK YOU

Richard.Barton@redcresearch.co.uk

Lea.Trichet@redcresearch.co.uk

Rosie.Osullivan@redcresearch.co.uk

www.redcresearch.ie

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