



UK Consumer Sustainability

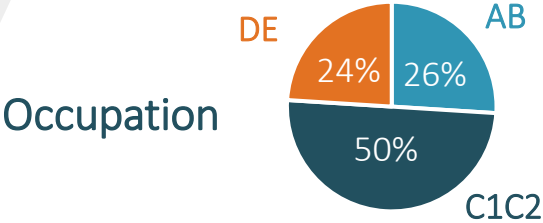
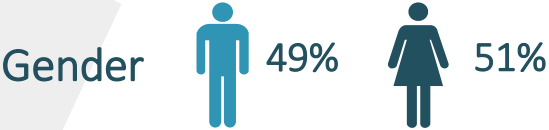
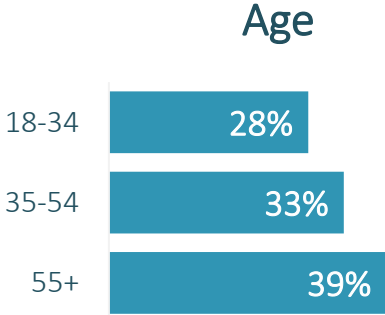
May 2023
REDC



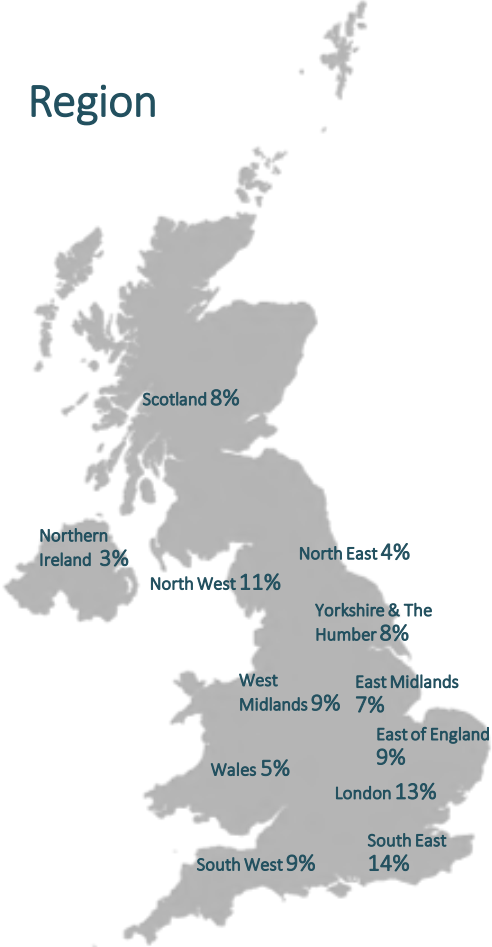
Sample and methodology



- Online Survey among a Nat Rep Sample of N=2,092 UK Adults
- Fieldwork conducted: 29th-30th March



Region



Questions were selected based upon topical areas of discussion in the UK regarding people and the environment



With the planned expansion of ULEZ in London, we looked at UK perceptions of air quality and public transport.



As the UK struggles with the rising cost of living, we explored the link between economic insecurity and its impact on sustainability and energy consumption.



Emissions from aviation are a significant contributor to climate change. We analyzed who is deliberately flying less frequently and moving towards more 'staycations' in the UK.



With the rise of the 'flexitarian' diet, we explored who is already reducing their intake of animal products, and who intends to do so in the future.



The second-hand market has boomed in recent times. We delved into who are the key demographics driving this increase.





1

Summary

RED C Sustainability Tracker Wave 6 – Key Headlines



While significantly fewer report feeling that environmental problems have a direct effect on their lives, significantly more now believe their personal actions *can* improve the environment.



The cost-of-living crisis continues to be a barrier for sustainability with half of UK adults (51%) wanting to live more sustainably but not feeling they can financially afford to do so.



Half of UK adults (49%) actively buy and / or sell second-hand products, a behavior mostly driven by 18-34s (61%) and women (58%).



Despite large improvements to London's air quality as a result of ULEZ charging and the roll out of hybrid / electric vehicles, more than 1 in 2 Londoners (55%) remain concerned about the air quality in their local area. This score is significantly higher than all other UK regions.



A third of UK adults (32%) regularly eat plant-based foods and limit their consumption of animal products, with women driving this (40%). Also, over half of women (55%) and 6 in 10 of those 55+ (61%) buy local, in season foods.



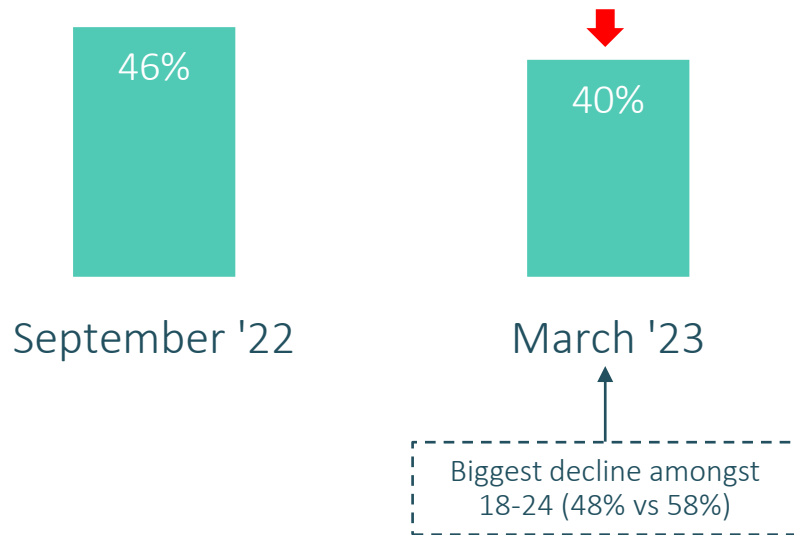
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Sustainable Attitudes & Behaviours

Significantly fewer report feeling that environmental problems have a direct effect on their lives today

T2B Agree

'Environmental problems have a direct effect on my life today'



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: Total Sample September'22 n=2,078, March '23 n=2092



Significant increase/decrease vs 7
Sep '22



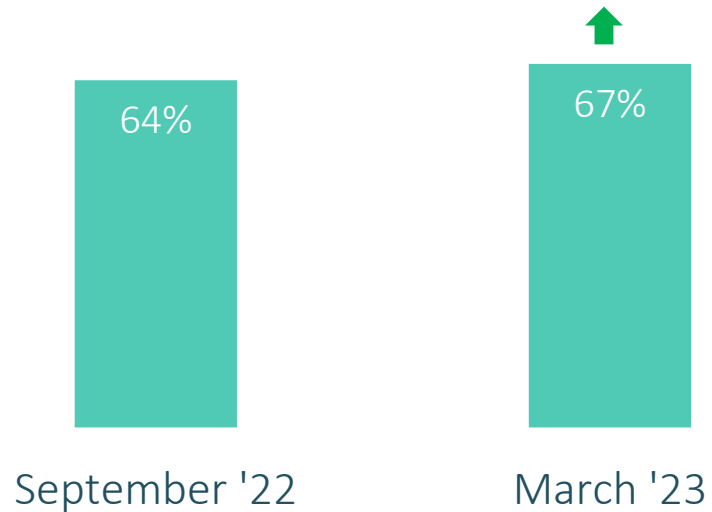
1 in 3 (31%*) report trying to not think about the climate crisis because of how depressing it is

(*18-24's 42%▲ vs 55+ 25%)



However, over two thirds believe their personal actions *can* improve the environment, significantly up compared to last wave

T2B Agree

'I believe my personal actions can improve the environment'



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  Significant increase/decrease YOY

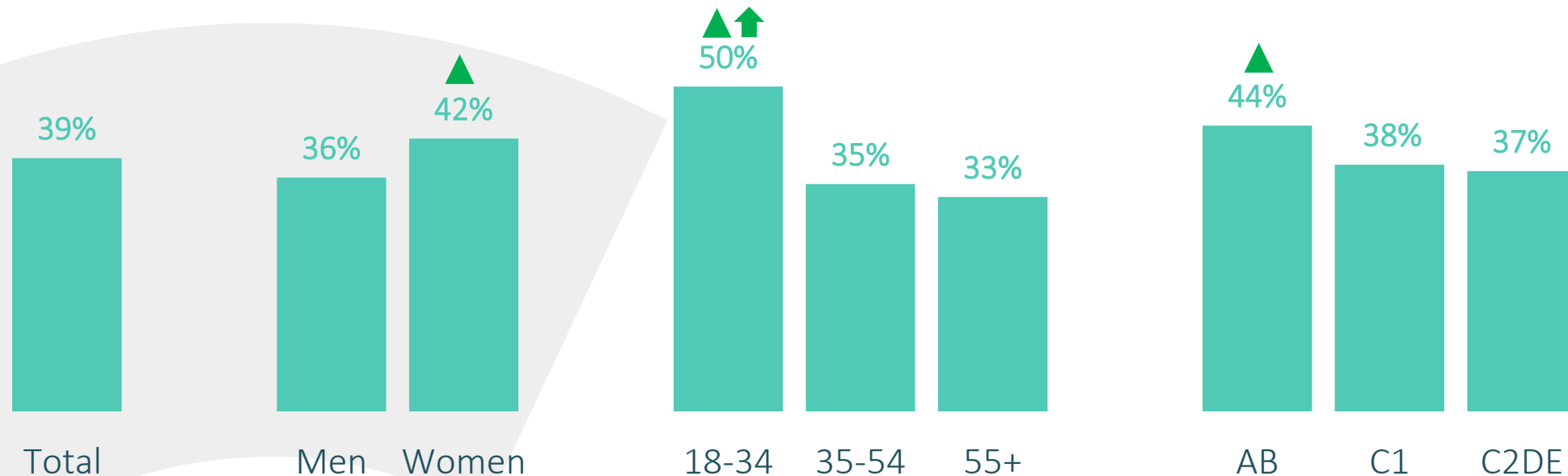
As we've seen previously, 18-34's and ABs are significantly more likely to seek out sustainable products



This wave, women are also significantly more likely than men to seek products that have been sustainably sourced/ produced

T2B Agree – by subgroups

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



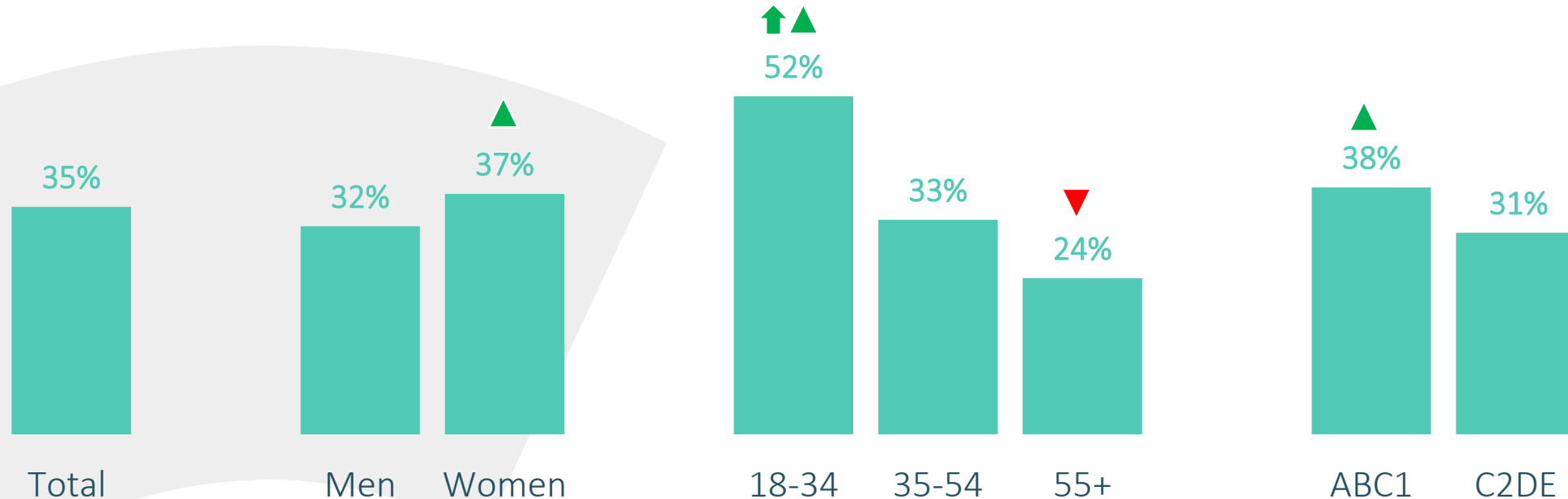
Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample March '23 n=2092, Men n= 1048, Women n=1044, 18-34 n=551, 35-54 n=705, 55+ n=836,ABC1 n=1177, C2DE n=915

These same groups actively look for brands that *explain the steps they take to offer more sustainable products*, up YoY for 18-34s



T2B Agree – by subgroups

'I actively look for brands that explain the steps they take to offer more sustainable products and services'



Q.1 How much do you agree or disagree with the following statements your personal views on the environment?/ Base: Total Sample March '23 n=2092, Men n= 1048, Women n=1044, 18-34 n=551, 35-54 n=705, 55+ n=836,ABC1 n=1177, C2DE n=915

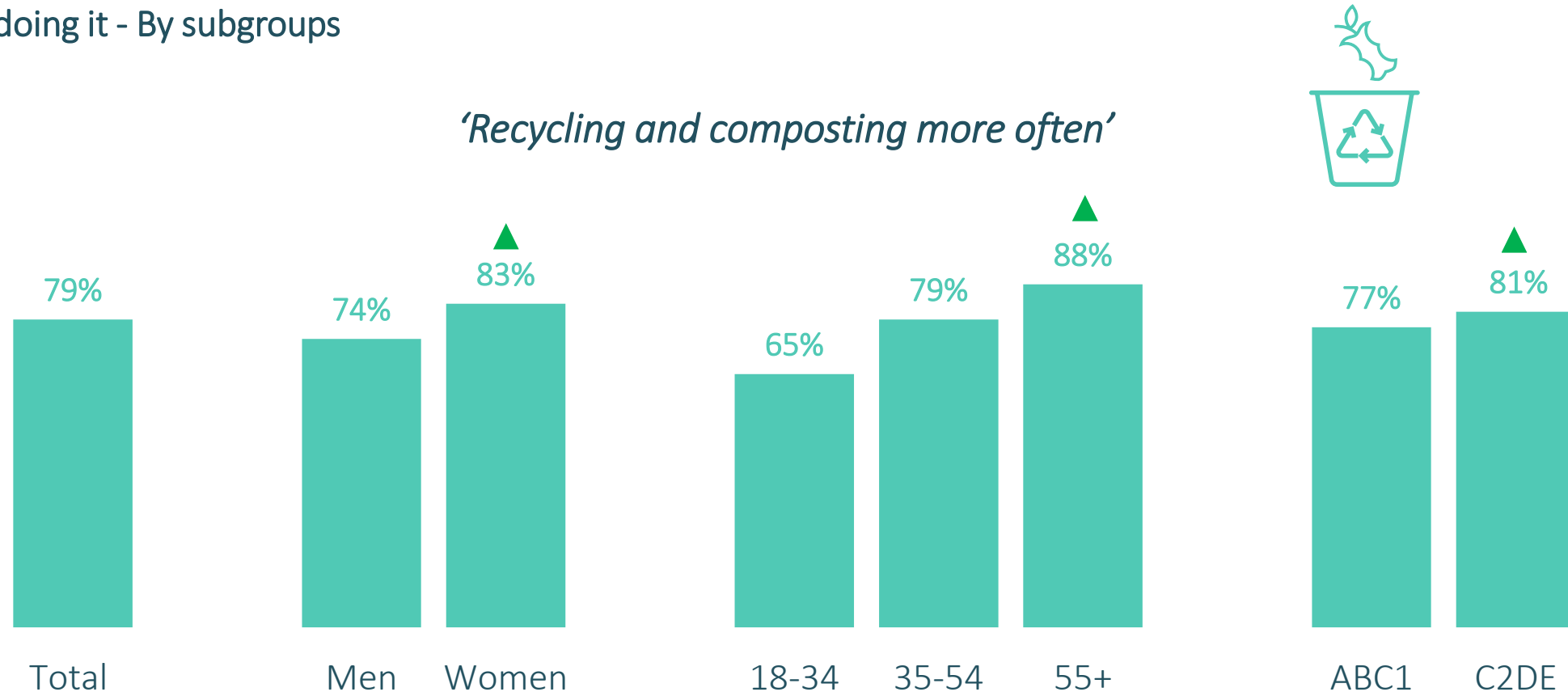
▲▲ Significant increase/decrease YOY
▲▼ Significantly up/down vs other groups @95%

8 in 10 UK adults report recycling and composting more often



55+ are the subgroup most likely to recycle and compost more regularly. Women and C2DE's also perform well

% Already doing it - By subgroups



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: Total Sample March '23 n=2092, Men n= 1048, Women n=1044, 18-34 n=551, 35-54 n=705, 55+ n=836, ABC1 n=1177, C2DE n=915

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

When it comes to gardening, around half already reduce or avoid using pesticides, and mow their lawn less often

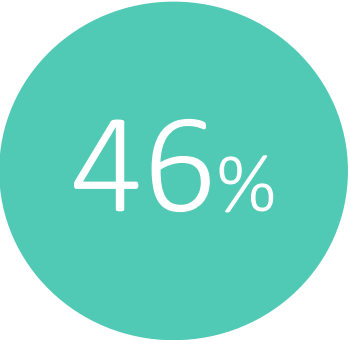
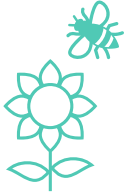
% Already doing it
(amongst those who said it was applicable to them)



'Reducing or avoiding use of pesticides'



'Mowing grass less often and planting pollinator friendly plants and trees'



Both statements significantly up amongst older age groups (55+)



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: Total Sample March '23 (n=2092)



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Cost of Living & Sustainability



7 in 10 (68%) people in the UK report cutting back on spending as a direct result of rising energy bills

Cost of living and the accompanying rising energy bills continue to be a barrier for sustainability

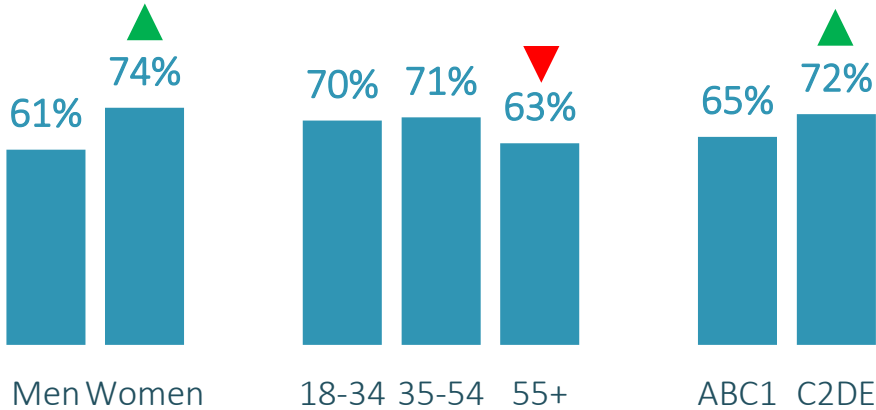


Women and C2DE's are feeling the economic pressures which is impacting upon their efforts to live sustainably

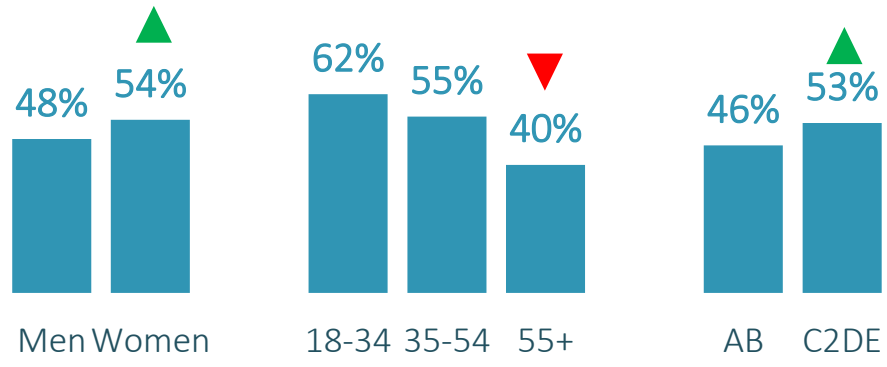
T2B Agree



'I am cutting back on my spending as a direct result of rising energy bills'



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



Men, Women, 35-54s, 55+, AB and C2DE all
↓
vs March 2022

*New statement for March 2023

▲ ▼ Significant increase/decrease vs. previous wave
▲ ▼ Significantly up/down vs other groups @95%

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Almost 8 in 10 report using less energy

This is driven significantly by Women, those 55+ and C2DE's

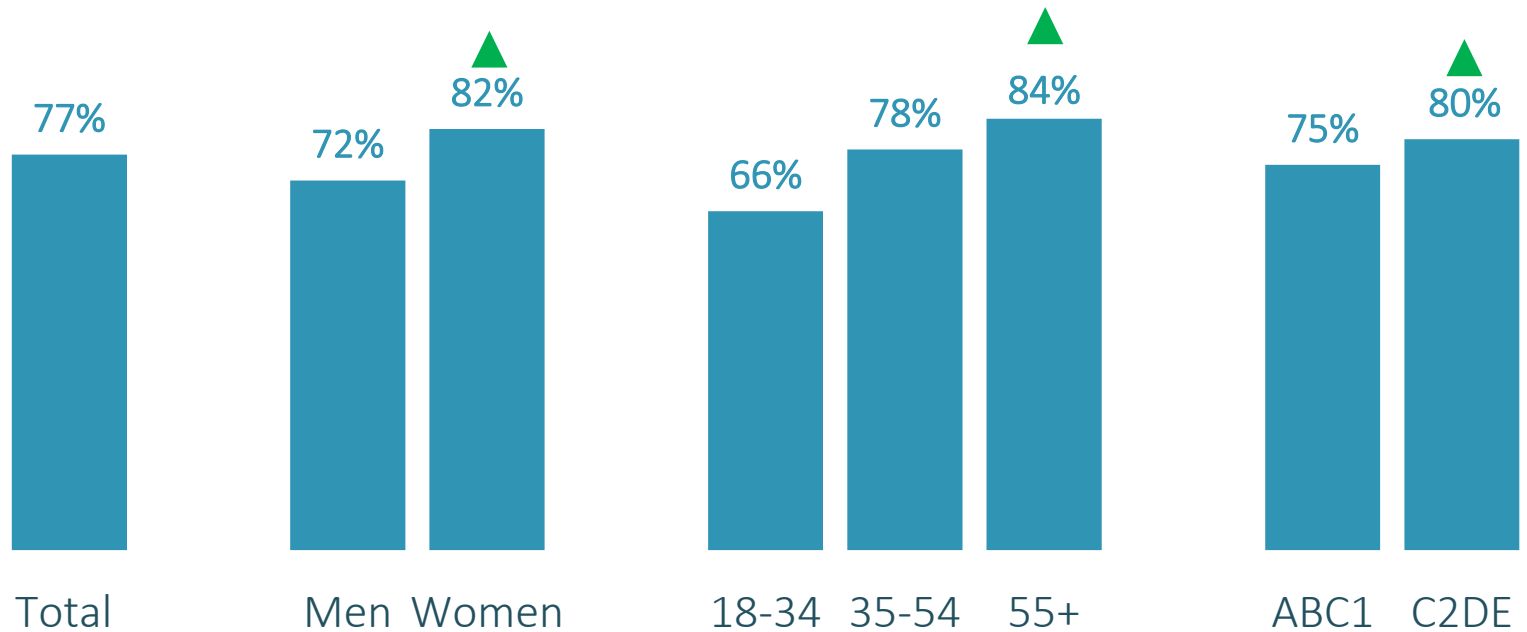
% Already Doing it



'Using less energy (e.g., electricity/ gas)'

Consumption of primary energy in the UK is **down 12%** compared to pre-pandemic levels. (Department for Business, Energy & Industrial Strategy 2023)

A **milder winter** is likely to be a key driver of this as households reduced their gas and electricity usage.



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4

The secondhand market

Half (*49%) of UK adults actively buy and/
or sell second-hand products
(e.g. clothing/furniture/electronics)

(* Women 58% vs Men 39% and 18-34's 61% vs 55+ 38%)

A fifth of men are not open to buying secondhand products

18-34's are most likely to purchase second-hand products in the next 12 months

16% of people are **not open to buying** second-hand products



Men (20%) ▲ vs Women (12%)
55+ (23%)▲ vs 35-54 (16%) & 18-34 (7%)



But, more positively:

13% of people **plan to buy** more second-hand products in the **next 12 months**



18-34 (19%)▲ vs 35-54(11%) & 55+ (11%)



16% of people are **open to buying** more second-hand products in the **next 5 years**



Men (18%) ▲ vs Women (14%)



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Air quality

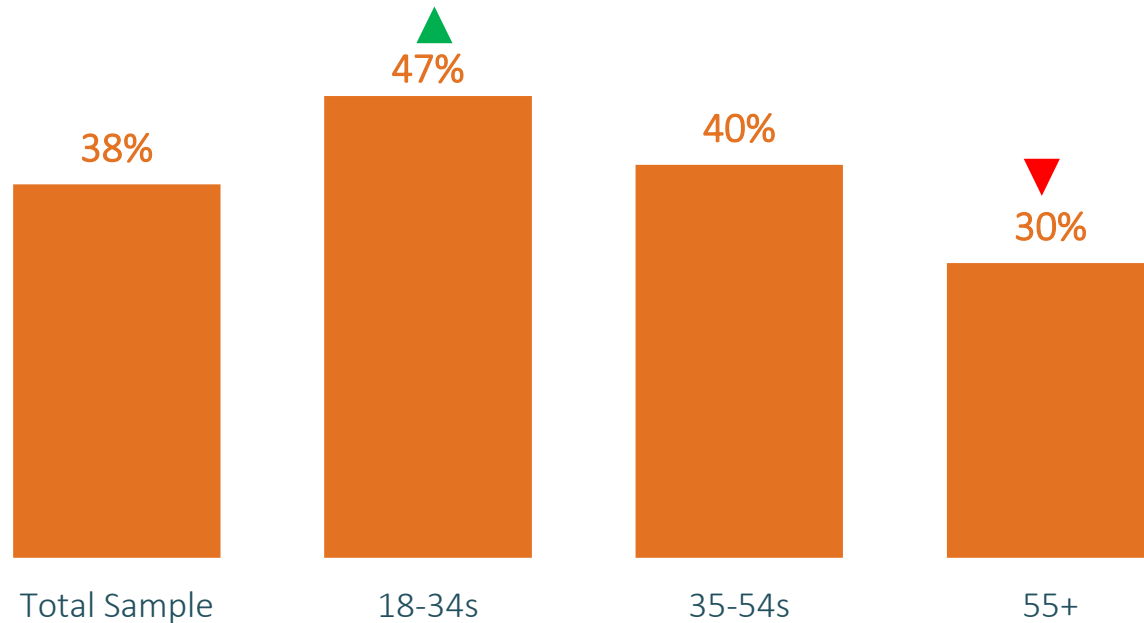


Air quality is a key concern, particularly among 18-34s

Concern over air quality declines with age

T2B Agree

'I am concerned about the air quality in my local area'



Q.1 How much do you agree or disagree with the following statements with regard to your personal views on the environment? Base: Total Sample n=2092, 18-34s n=551, 35-54 n=705, 55+ n=836

  Significantly up/down vs the total sample @95%

More than half of Londoners
(55%*) are concerned about the
air quality in their local area

(*London▲ vs all other regions)

Air pollution in London is having a detrimental impact on health



Research by Imperial College brings to light the shocking effects on health across the life course

🕒 APRIL 19, 2023

✓✓ Editors' notes

Review highlights lifelong health impacts of air pollution

by Ryan O'Hare, Imperial College London

ULEZ Expansion 2023

To help clear London's air and improve health, the Ultra Low Emission Zone (ULEZ) is expanding across all London boroughs from 29 August 2023.

Sadiq Khan issues high air-pollution alert for London

🕒 24 January

Table 1 Summary of the health outcomes from air pollution that are highlighted in this report.

Life stage	Health impact
Pregnancy and birth outcomes	Foetal development Low birth weight Gestational age and pre-term births Miscarriage Sperm count and mobility
The developing child: from birth, through adolescence	Lung growth Asthma Blood pressure Cognitive abilities Inattention and hyperactivity Mental health and illness
Adulthood	Early death Cardiac health Stroke Brain and mental health Respiratory health

Commercial in confidence

April 2023

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Transport



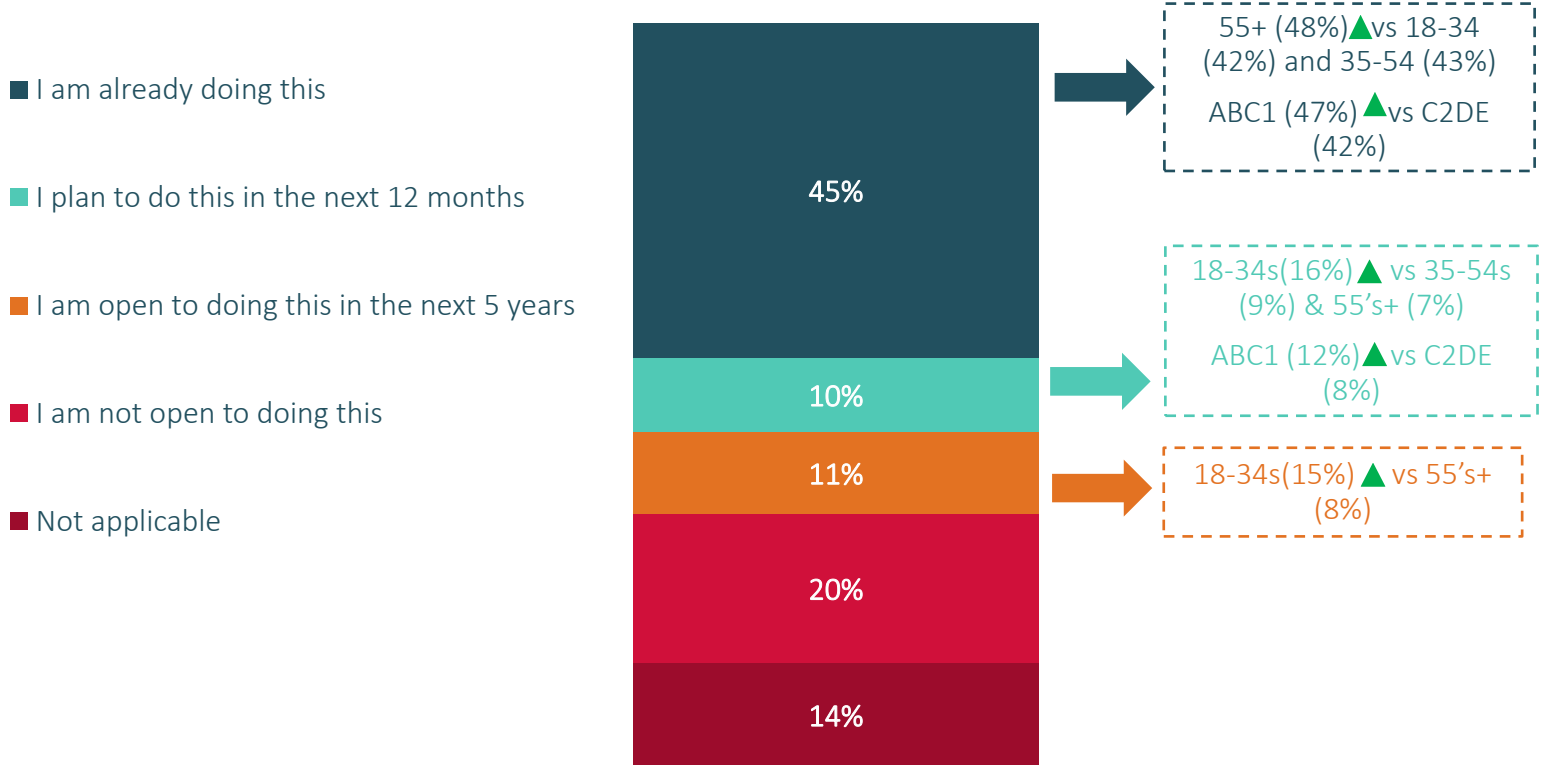
4 in 10 (38%*) report flying less often

(*Women 41% ▲vs Men 35% & ABC1 42% ▲vs C2DE 34%)

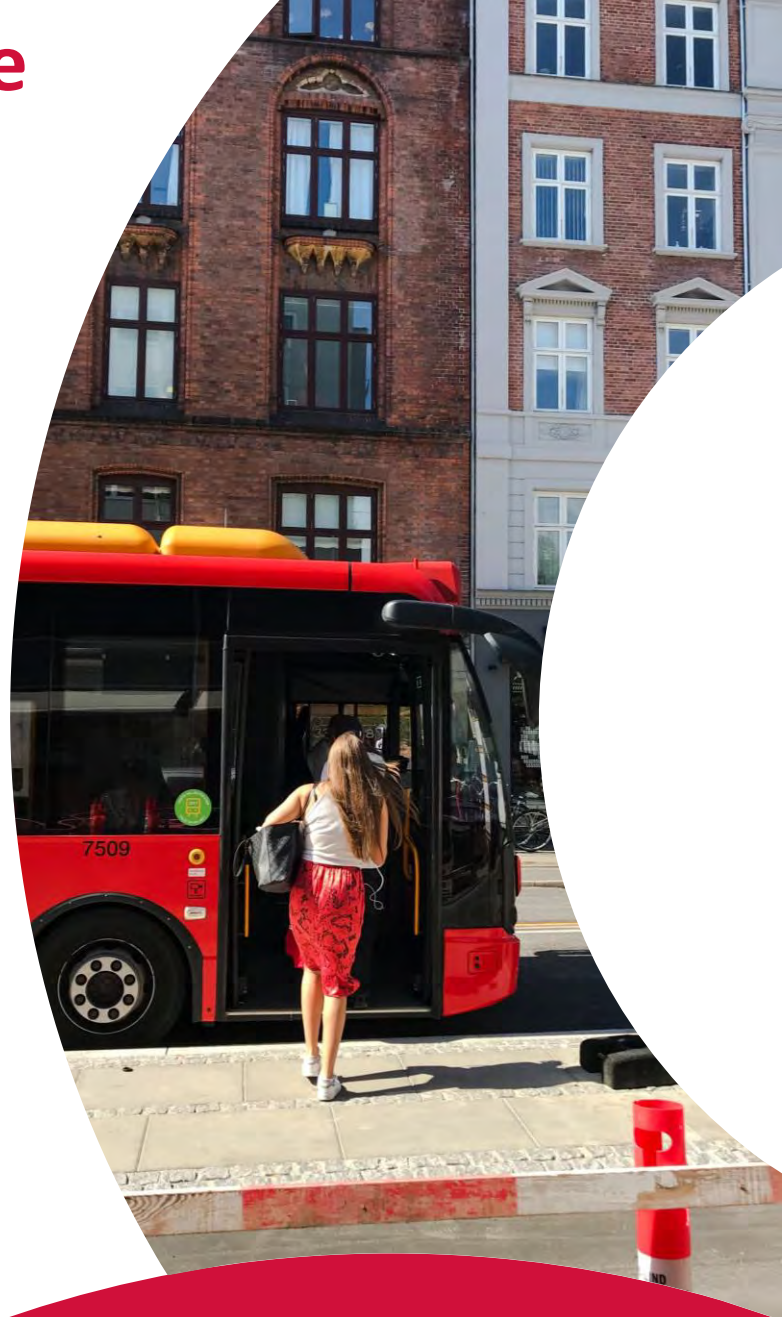
55+s and ABC1s are significantly more likely to be using more public transport /walking or cycling

ABC1s are also more likely to do this in the next 12 months

Reduction in driving & using public transport / walking / cycling instead



Driving less often and using more public transport or walking or cycling instead



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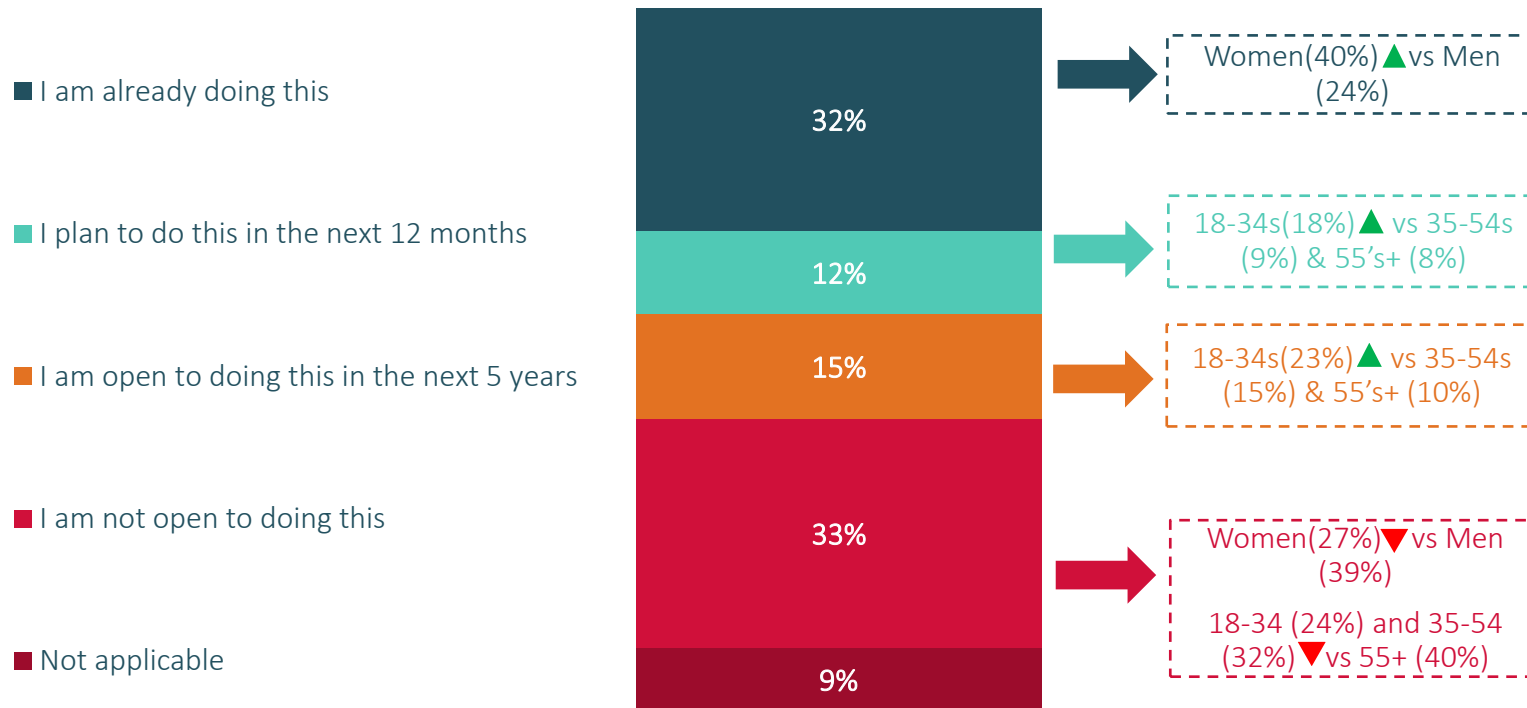
7

Food

1 in 3 regularly eat plant-based foods & limit their consumption of animal products

Women and those 18-34 are significantly more likely to already be doing this, or plan to / are open to doing it

Consumption of plant-based foods & reduction in animal products - Total Sample



Regularly eating plant-based foods and limiting consumption of animal products (e.g. meat/fish/eggs/dairy)



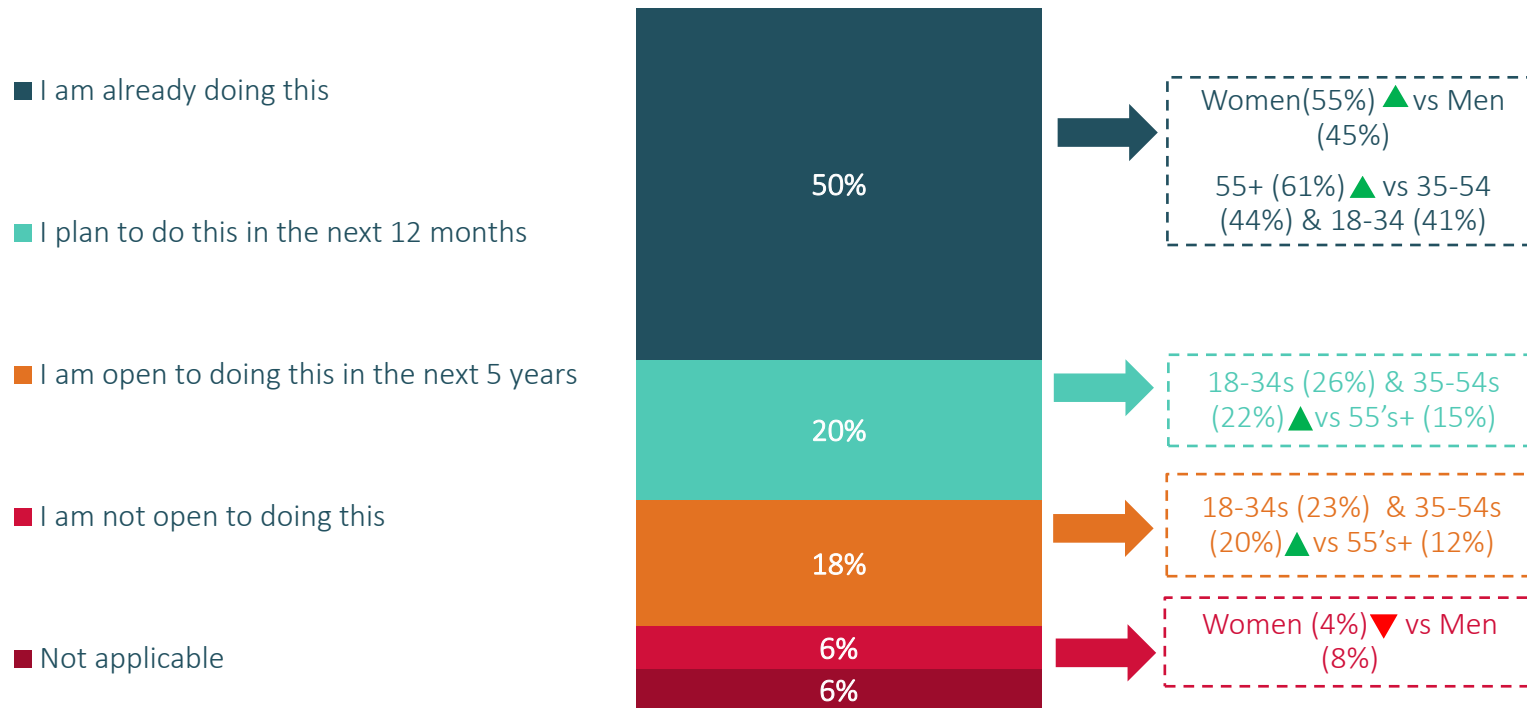


Half of UK adults (50%) are buying local,
in-season food
(e.g. fruit and vegetables that are in-season and grown locally)

Women & those 55+ are the biggest purchasers of local, in season food

Almost half of 18-34s plan to or are open to doing this in the next 5 years

Buying local, in season food- Total Sample



Buying local, in-season food (e.g., fruit and vegetables that are in-season and grown locally)



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4 in 10 (40%*) are buying fewer products that contain Palm Oil

(*Women 47% vs Men 33% & 55+'s 42% vs 18-34s 36%)

THANK YOU

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