



RED C Sustainability Monitor

Environmental Attitudes and Behaviours in Ireland

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Monitoring Sustainability

RED C has been tracking consumer views and behaviours pertaining to sustainability and the environment in the Republic of Ireland since July 2019



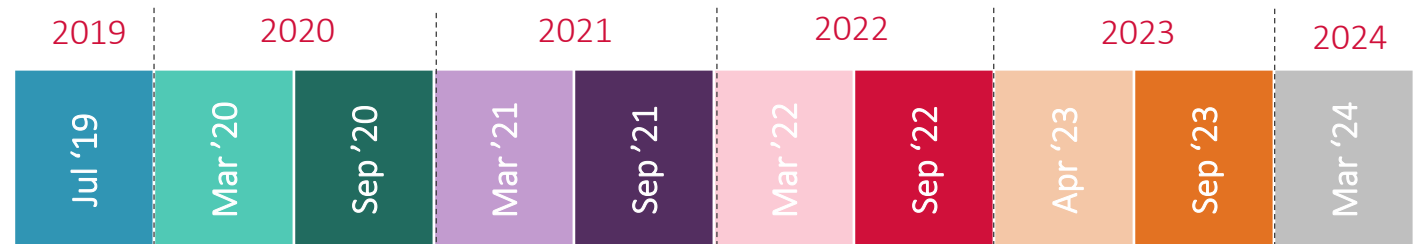
The RED C Sustainability Monitor – tracking behaviour since July 2019

This latest edition of RED C’s Sustainability Monitor (previously published in October 2023) looks at consumer views on sustainability issues in Ireland.

Questions were tested on RED C’s own online omnibus service, **RED Line**, in Ireland. A nationally representative sample of adults aged 18+ surveyed as follows:

/ n=1,002 in Ireland, with fieldwork in current wave conducted between 29th February and 5th March 2024

Months covered in RED C Sustainability Monitor



Strong desire by consumers for brands to lead on sustainability



RED C Consumer Sustainability Monitor – April 2024

Some rebound in belief that personal actions matter, with consumer knowledge also seeming to grow

Following a sharp decline in April '23 in consumer belief that personal actions can make a difference on the environment, this belief is slowly rebounding, with 2 in 3 now in agreement on this. There are also strong indications that consumers are feeling more confident when it comes to their knowledge on how to live more sustainably, with only 2 in 5 saying they are not sure how to live more sustainably versus 3 in 5 making this claim at this same time in 2021.

Consumers still sceptical of Ireland hitting climate targets, with personal finances a barrier to some

Challenges remain, however, with only 1 in 10 feeling that Ireland is currently on track to hit its 2030 climate targets. To 2 in 3 Irish adults, finances are also seen as a barrier to living more sustainably to 2 in 3, and no sustained shift to purchase of sustainable products. To add to these challenges, less than half believe environmental problems are having a direct effect on their lives, with this even falling back since Sep '23 and especially driven by those in rural areas (-11%).

Strong desire for brands to lead and for government to invest in renewables and support on home retrofits

As a result of these challenges faced by consumers, the majority (7 in 10) are keen for brands to lead the way on sustainability, with this feeling especially strong amongst women. There is also a continued desire to focus investments on renewables (especially offshore), home retrofits, public transportation, and native tree growth as opposed to other areas such as electric car infrastructure (only 12% want focus on this).

Brands should tread this space carefully, with risk of consumers switching due to perceived greenwashing or sustainability concerns

For brands who are navigating this space, which is probably most, there is a need to be mindful that over half of consumers claim to be willing to switch brands if they suspected them of greenwashing, particularly those aged 65+, and a notable cohort who claim to have switched as a result of sustainability concerns, particularly 18-34-year-olds and those in higher social grades. Irish brands seem to be more at risk in this regard than those in the UK.

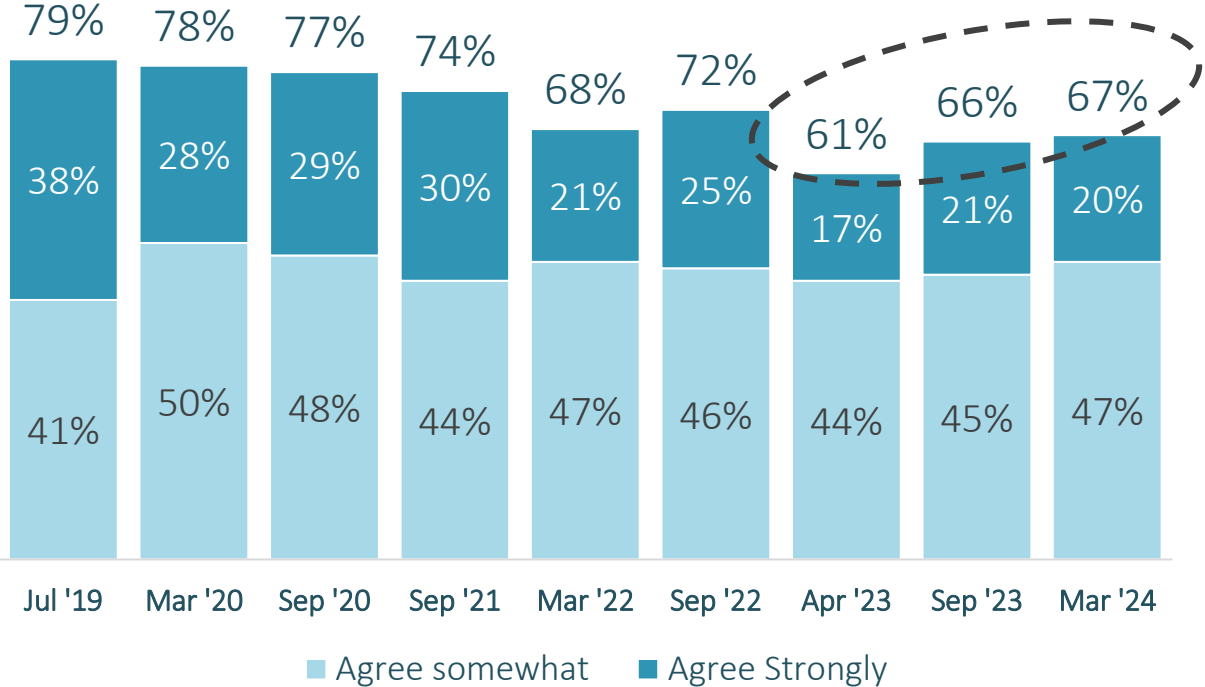


Some rebound in
public's belief
personal actions
make a difference
with environment,
coupled with
growing awareness
in how to do this

Some initial signs of rebound in belief that personal actions can help environment

Following steady declines since Jul '19, there are signs of a small rebound in belief in impact of one's personal actions

I believe my personal actions can improve the environment



▲ ▼ Indicates significant difference vs Sep '23
 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+)

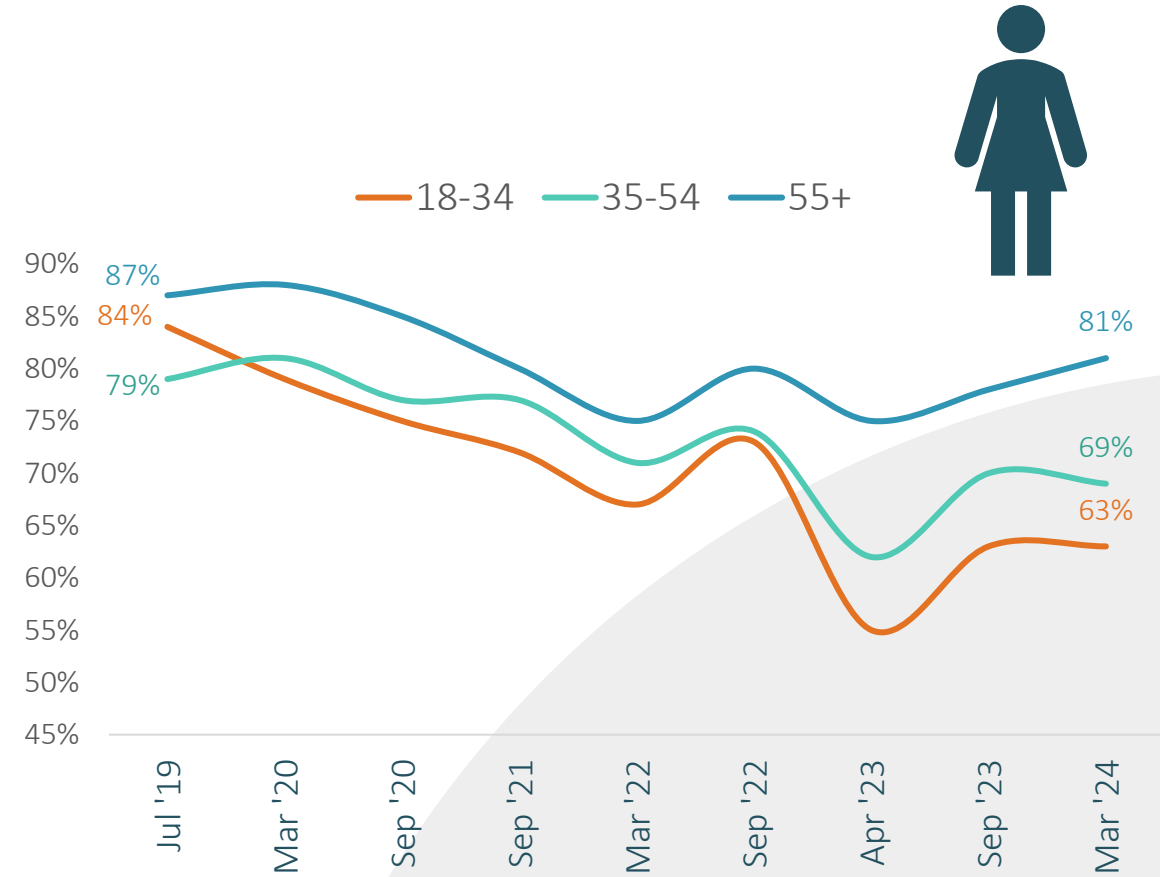
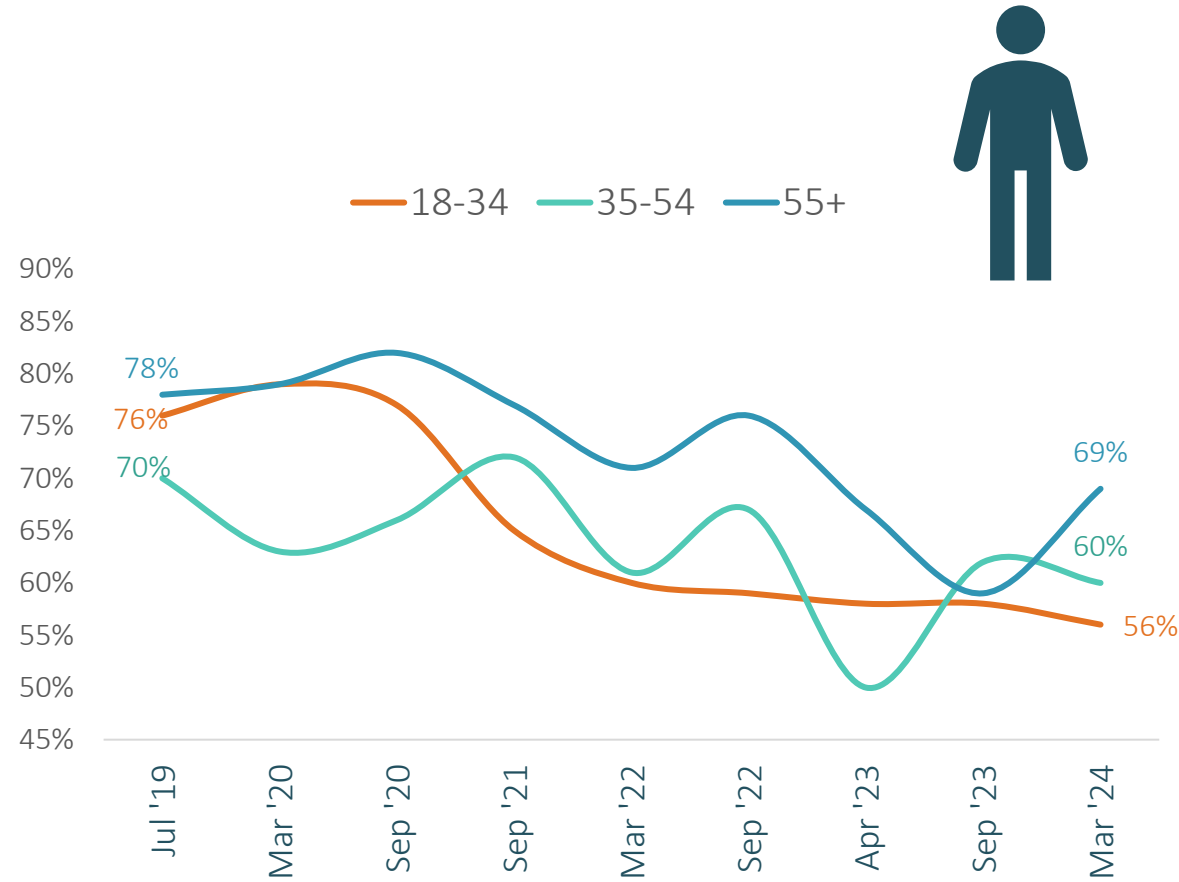


Rebound driven by 55+ ages, while younger ages remain lower



18-34-year-old men in particular maintain gradual, downward trend since Mar '20 amidst early days of Covid pandemic. 18-34-year-old women also at lower level, but not as low as young men.

Belief that one's personal actions can improve the environment

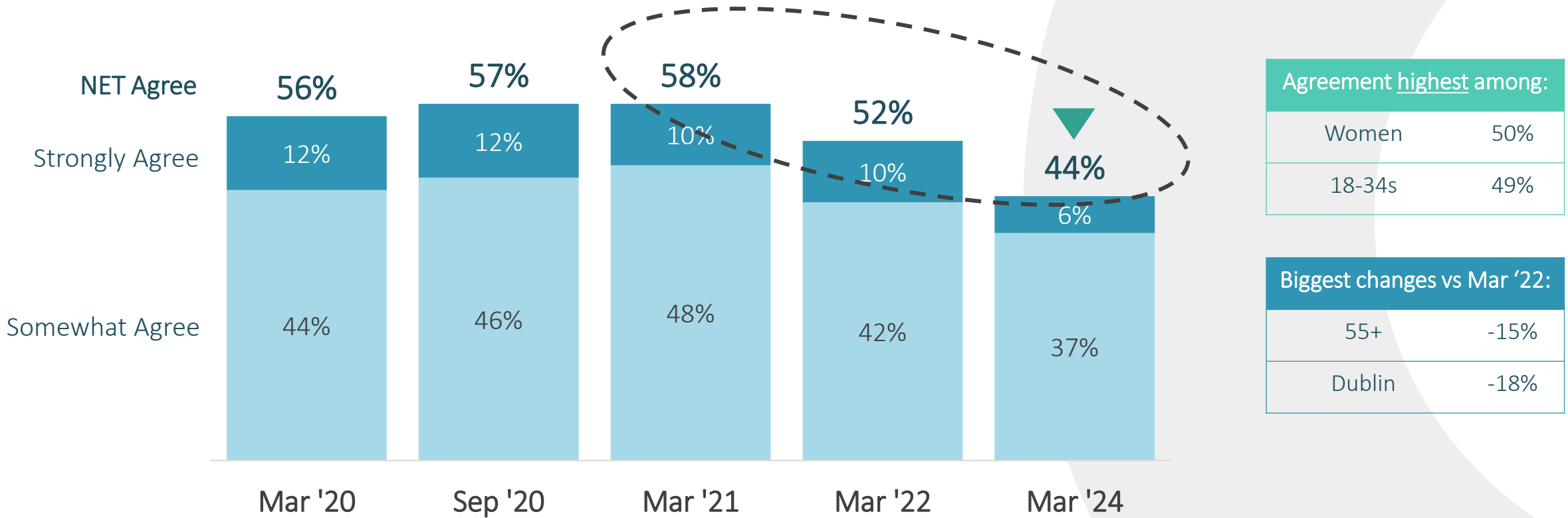


Signs public becoming more knowledgeable on sustainability



Fewer are saying they'd like to live sustainably, but don't know how, than in 2021-22, with this especially driven by Dubliners and over 55s, with women and under-35's seemingly seeking more information on this.

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 adults aged 18+)

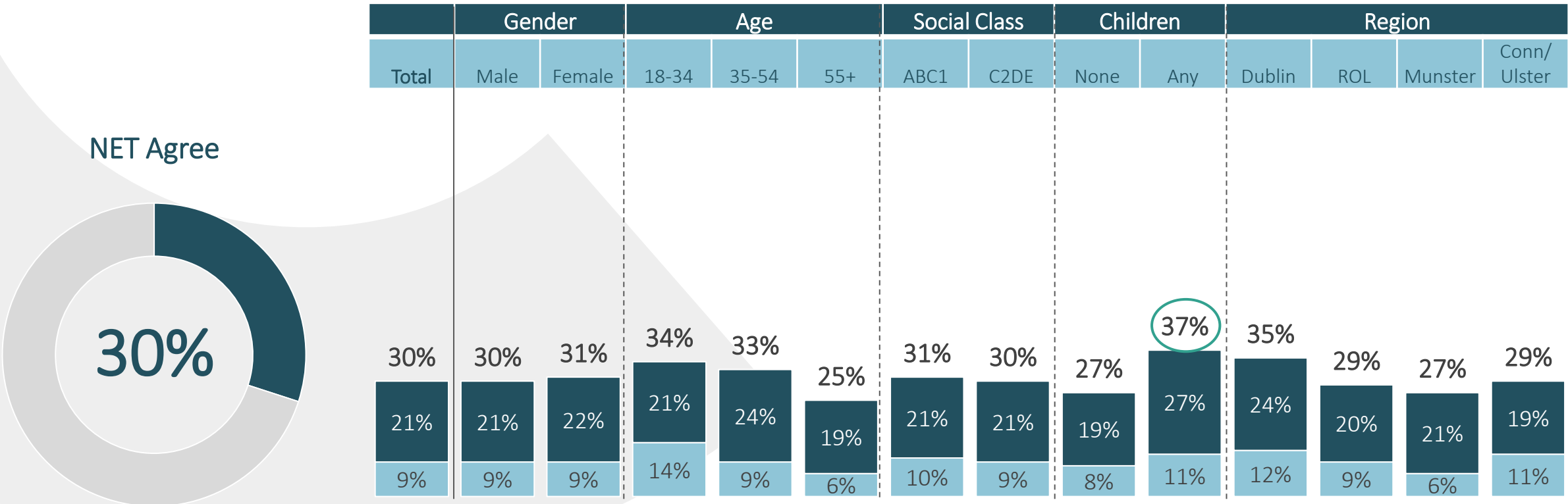
▲ ▼ Indicates significant difference vs Mar '22

Nearly 1 in 3 have used the Deposit Return Scheme in past month



Less than a third of Irish adults say they have used the new deposit return scheme even once in the past month. Usage is higher among parents, and lower among over 55s.

I have used the Deposit Return Scheme for bottles or cans in the past month



○ Significantly higher/lower than national average

(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, public is highly sceptical that Ireland is on pace to reach its 2030 emissions reduction targets

Low proportion believe Ireland on pace to meet emissions target

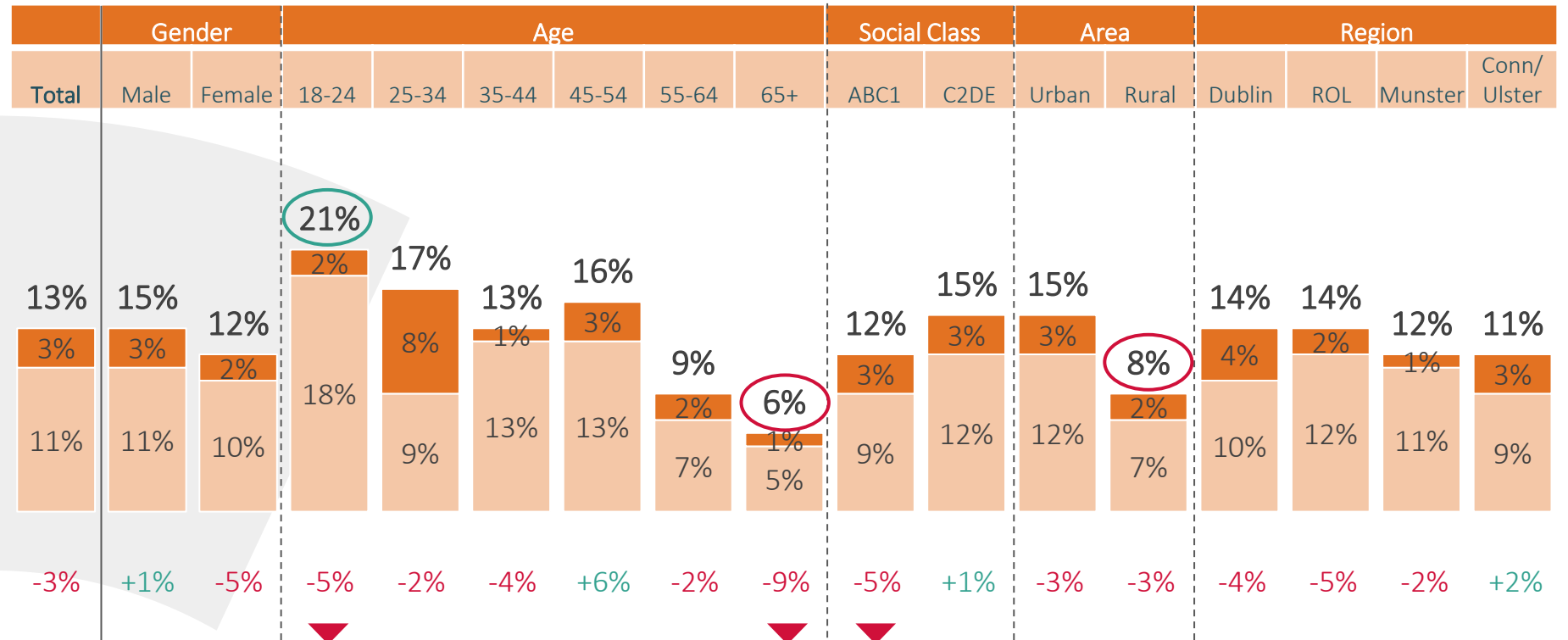
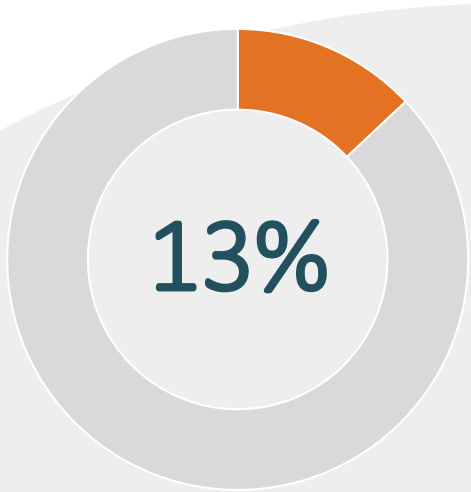


Decline vs Sep '23 in those who believe Ireland is on pace to reach 2030 emissions targets, with 65+ ages and higher social grades driving this decline. 65+ ages and those in rural areas are especially sceptical on this.

Ireland is currently on pace to reach its 2030 emissions reduction target

NET Agree
Strongly Agree
Somewhat Agree

NET Agree



○ Significantly higher/lower than national average

▼ Significant drop vs Sep '23

(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+)



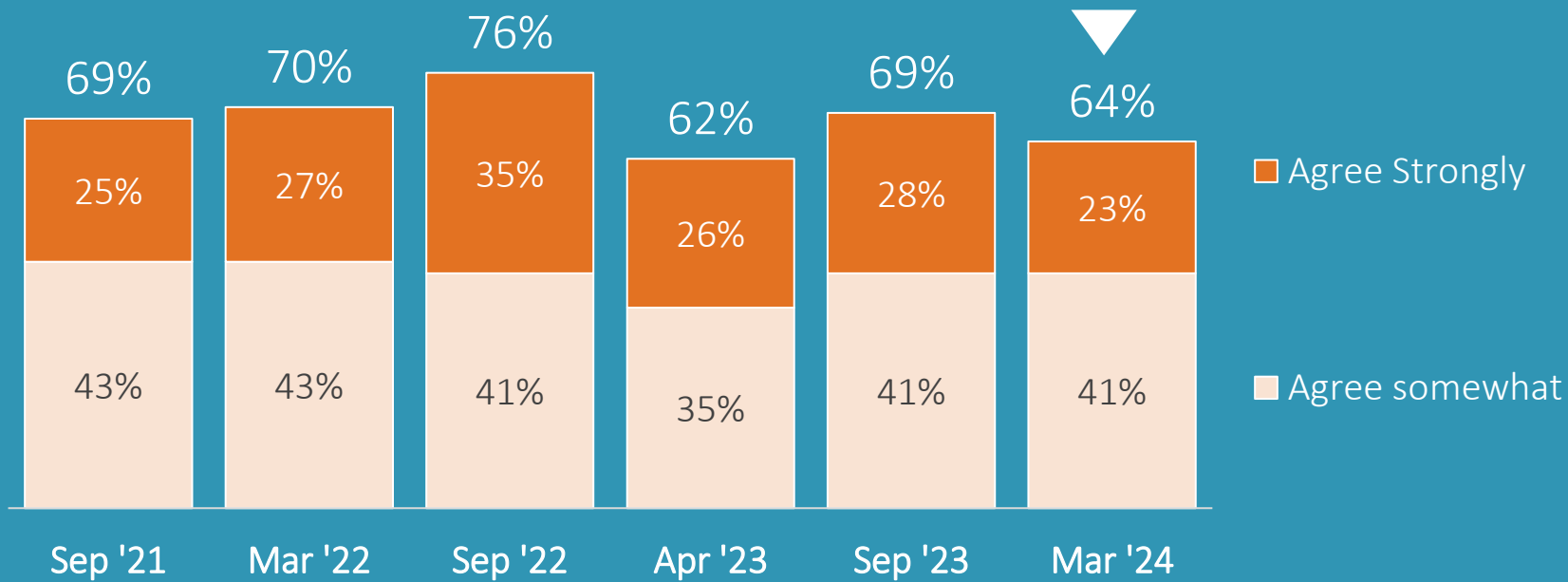
Finances appear to still be a barrier to living more sustainably, and purchasing of sustainable products is not growing over time



Finances still a significant barrier for the 2 in 3 who would like to live more sustainably

However, there are some signs of improvement since Sep '23, with this change especially notable amongst 18-34-year-olds.

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



Agreement <i>highest</i> among:	
35-54-year-olds	68%
Those with dependent children	71%

Notable changes vs Sep '23:	
18-34-year-olds	-14%
55+ ages	+5%

○ Significantly higher/lower than national average

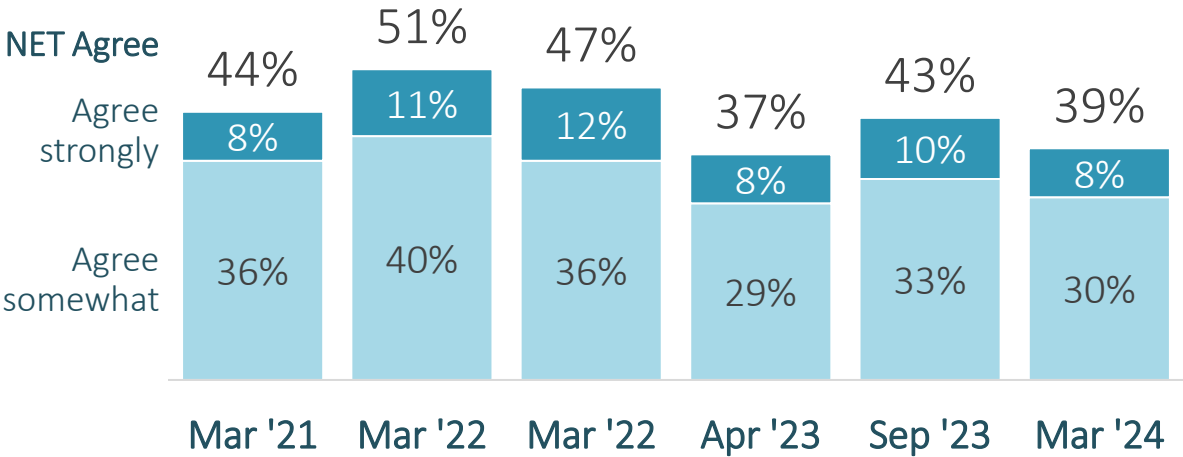
Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

(Base: all adults aged 18+)

▲ ▼ Indicates significant difference vs Sept '23

Shift toward sustainable products is unstable over time since Mar '21

I specifically seek out products that are sustainably sourced/produced



Agreement is *highest* among 18-24-year-olds (47%) and women in higher social grades (47%)

▲ ▼ Indicates significant difference vs Sep '23
 Q.1 - How much do you agree or disagree with the following statements with regard to your personal views on the environment?

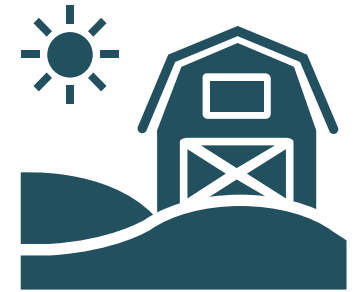
(Base: all adults aged 18+)





Environmental
problems still not
seen as
immediate threat
to over half

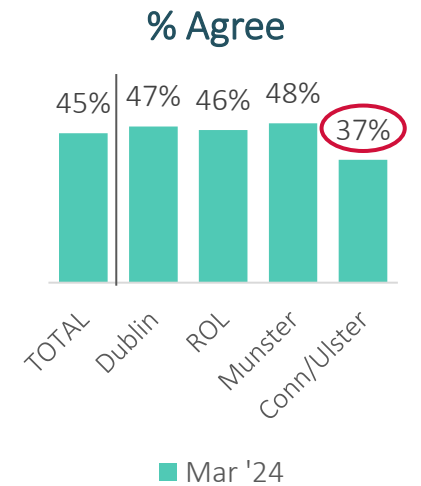
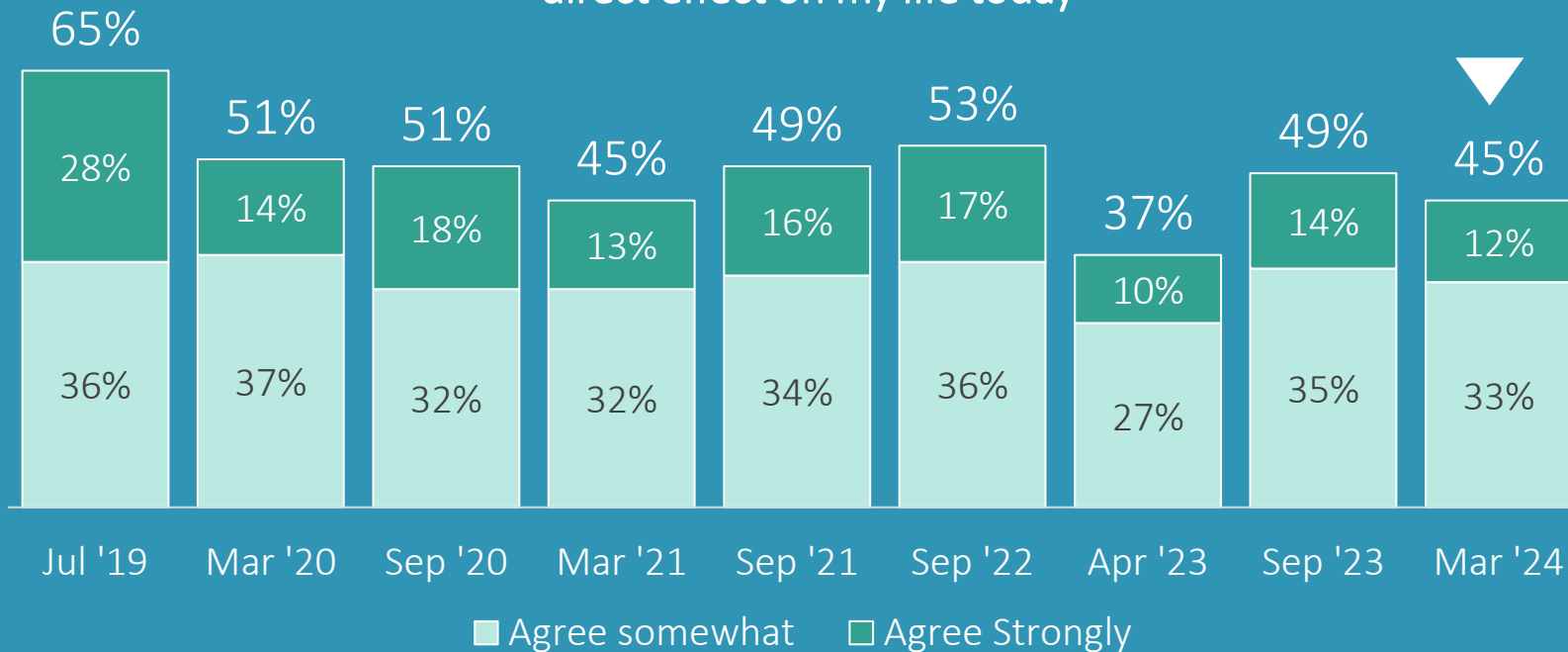
Less than half believe environmental problems have a direct effect on their life



Decline is especially driven by those in Rural areas, with agreement amongst this group declining by **-11%** versus Sep '23

This belief remains majorly depressed since the pre-Covid period, with this decline broad in nature. Most recent decline, however, is driven by those in Rural areas.

Environmental problems have a direct effect on my life today



▲▼ Indicates significant difference vs Sep '23

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+)



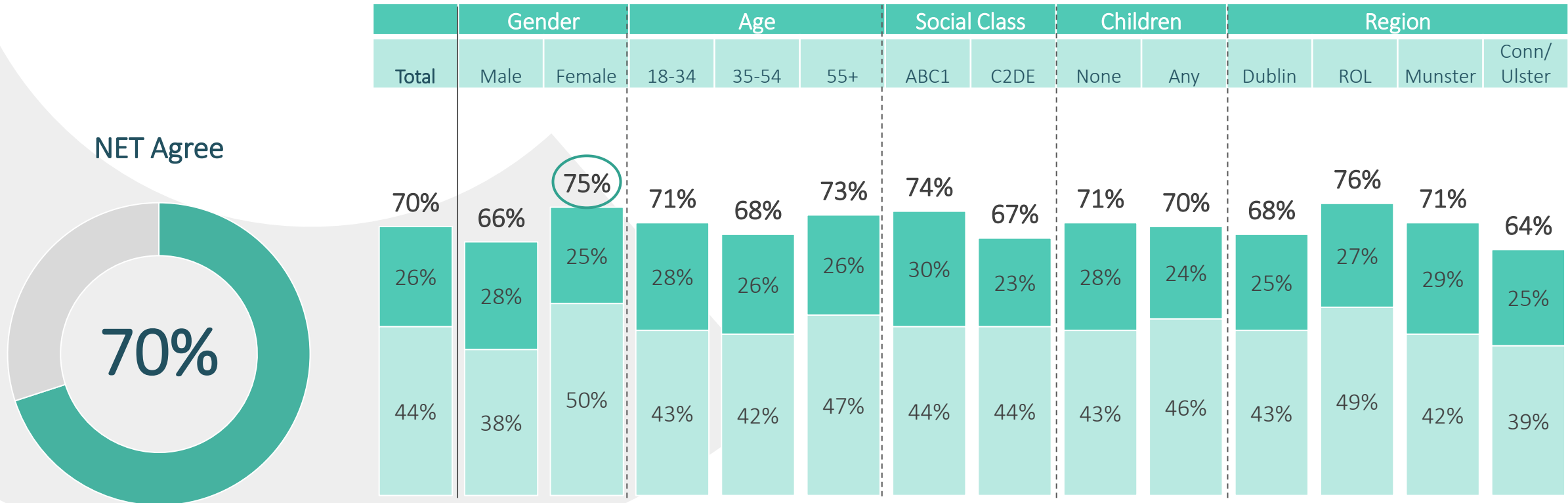
Majority want brands to lead the way, with desire to see investments in renewable energy prioritised over other areas such as electric car infrastructure

Most consumers want brands to lead on sustainability



7 in 10 expect brands to lead on helping them be more sustainable. This is high across all demographics, but particularly among women and higher social grades.

I expect brands to lead on helping me be more sustainable



○ Significantly higher/lower than national average

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

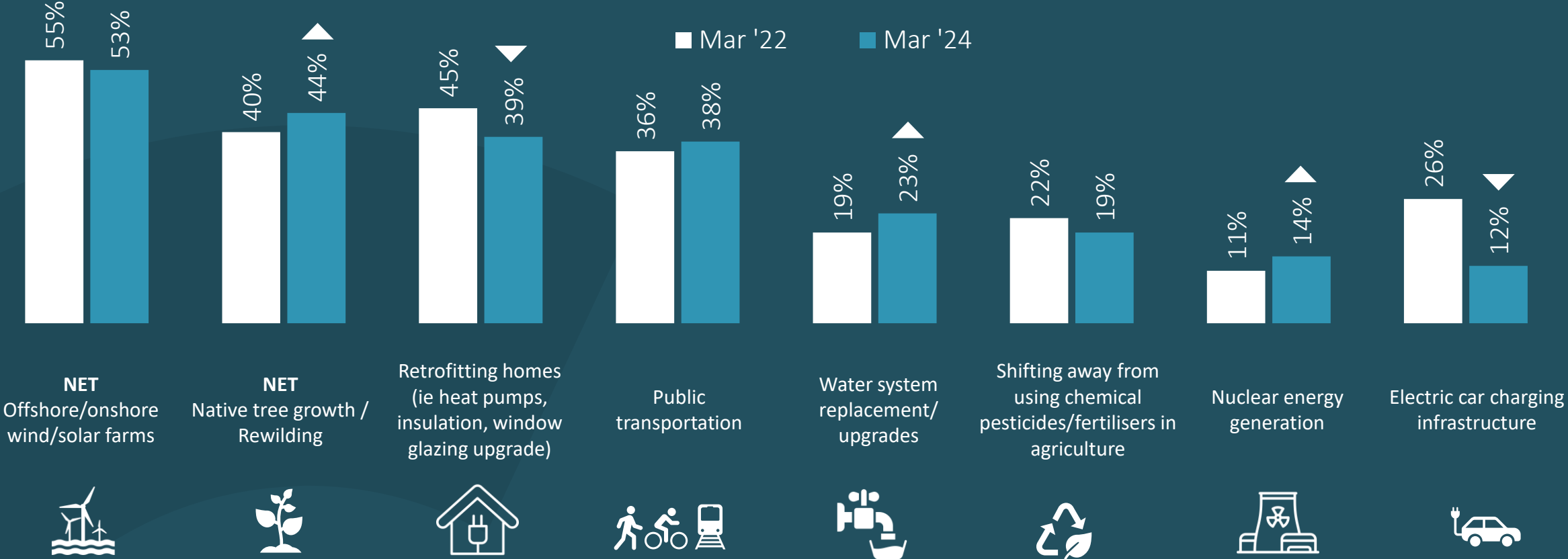
(Base: all adults aged 18+)

Renewable energy continues to be seen as key investment



Over half would like to see investment focused in wind/solar farms. Up on 2022, rewilding/tree growth is the next most popular option, now followed by retrofitting which is down on 2022. We also see highest support for water upgrades, and nuclear energy, and a notable drop in support for electric car charging infrastructure.

Investments would like to see for a sustainable future



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?

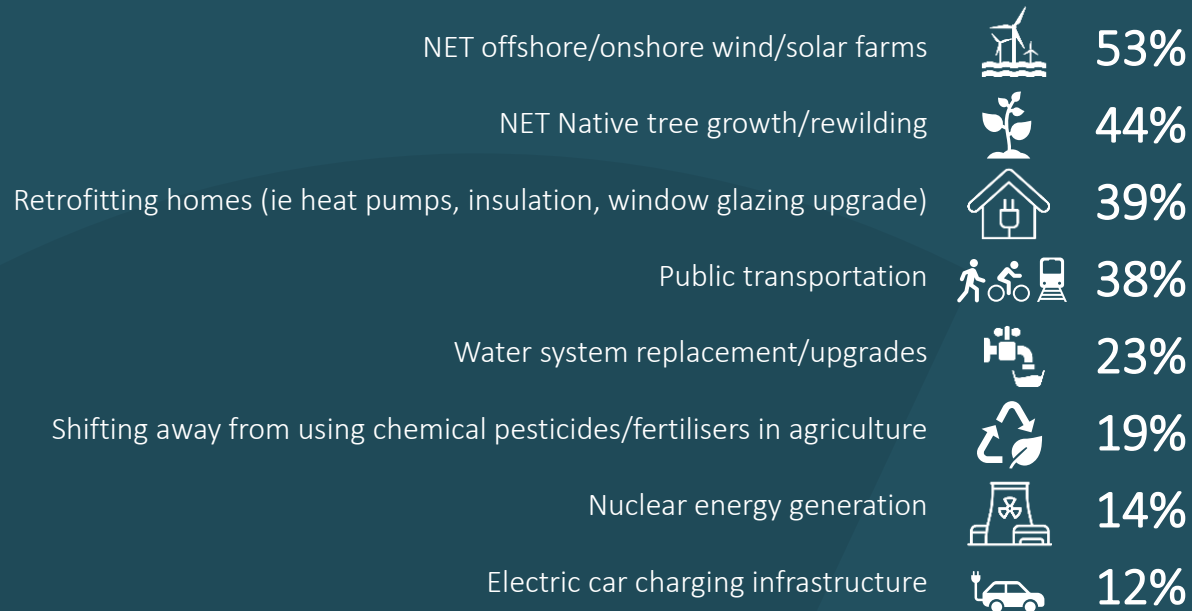
(Base: all adults aged 18+)

Men more likely to favour investment in renewable energy



Men are more likely to prioritise both wind/solar farms and nuclear energy generation. Older age cohorts are more likely to favour wind/solar farms, and also retrofitting of homes.

Investments would like to see for a sustainable future



Gender		Age			Social Grade	
Male	Female	18-34	35-54	55+	ABC1	C2DE
60%	46%	49%	48%	61%	58%	47%
44%	45%	40%	47%	45%	49%	42%
36%	43%	28%	41%	46%	40%	40%
36%	41%	45%	37%	34%	42%	35%
19%	27%	20%	24%	24%	21%	26%
16%	22%	20%	18%	20%	18%	21%
21%	7%	14%	14%	14%	15%	12%
14%	11%	13%	14%	10%	15%	11%

Top preferred area of investment

Significantly HIGHER vs Total

Significantly LOWER vs Total

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+)

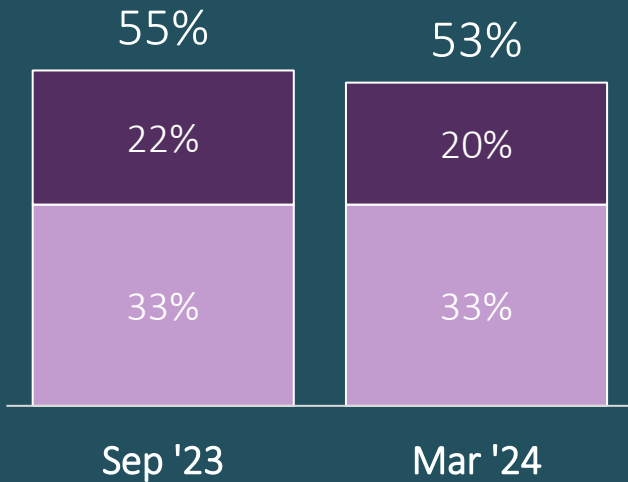
Opportunity for brands, but consumers are willing to switch due to perceived greenwashing or other sustainability concerns



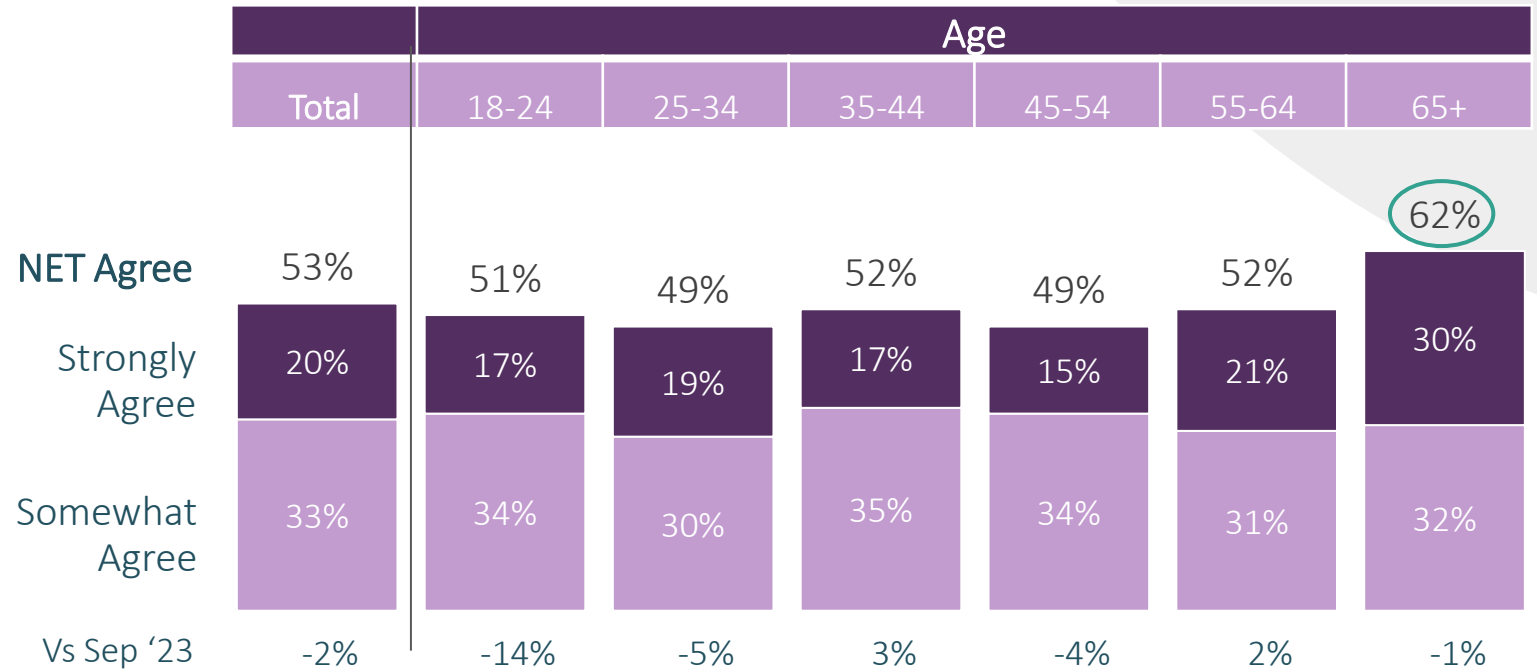
Over half would still switch brands due to greenwashing



NET Agree



I would strongly consider switching brands if I suspected them of greenwashing



○ Significantly higher/lower than national average
 (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+)

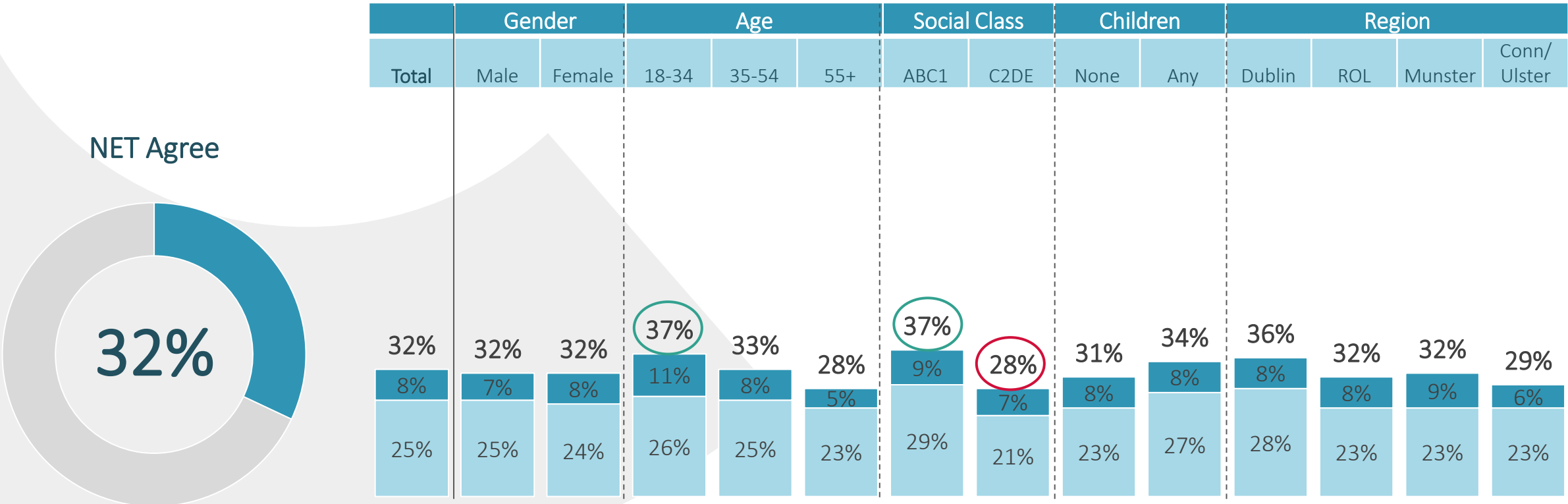
NOTE: Agreement is also high amongst higher social grades (61%)

Level of brand switching due to sustainability concerns evident



Roughly a third of consumers report that they have switched brands due to sustainability concerns in the past. This is highest among under 34s, higher social grades, parents, and in Dublin.

I have switched products or brands due to sustainability concerns



NET Agree

32%

○ Significantly higher/lower than national average

(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+)

Financial burdens
in Ireland mean
more pressure on
brands than seen
in the UK and
stronger desire
for investments in
offshore
renewables and
home retrofits

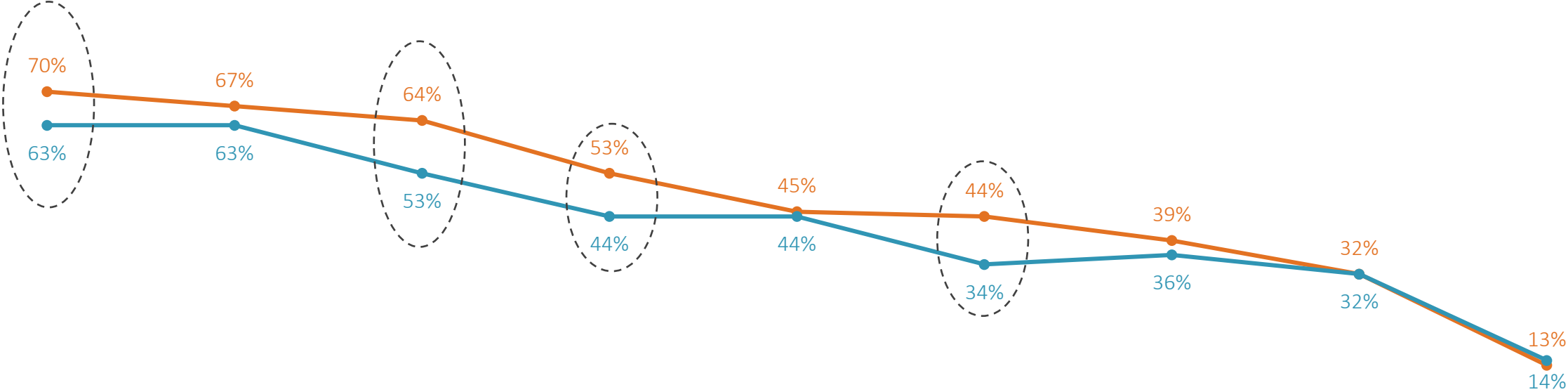


ROI adults more likely to expect brands to lead on sustainability



ROI adults are also more likely to say they can't afford or don't know how to live more sustainably, and are more likely to say they'd switch brands in the case of suspected greenwashing.

% Agree



- I expect brands to lead on helping me be more sustainable
- I believe my personal actions can improve the environment
- I would like to live more sustainably, but I cannot financially afford to make the changes needed to do so
- I would strongly consider switching brands if I suspected them of greenwashing
- Environmental problems have a direct effect on my life today
- I would like to live more sustainably, but I'm not sure how
- I specifically seek out products that are sustainably sourced/produced
- I have switched products or brands due to sustainability concerns
- The country is currently on pace to reach its 2030 emissions reduction target

ROI UK

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

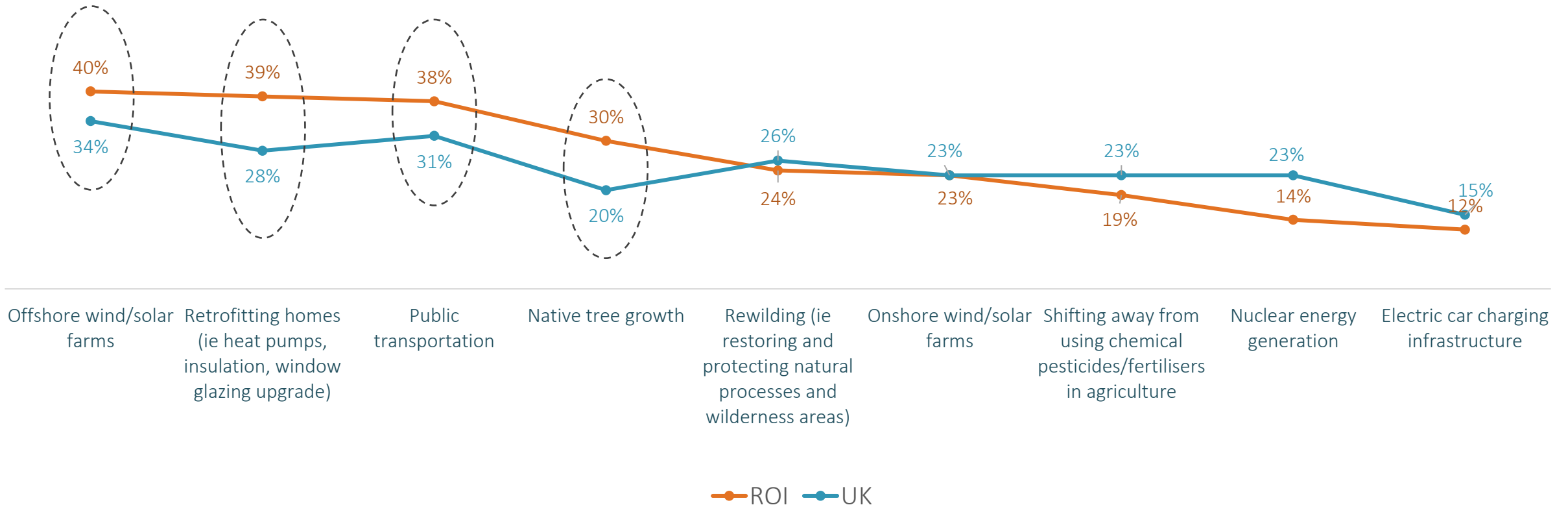
(Base: all adults aged 18+)

Some divergence in investment priorities between UK and ROI



ROI adults are notably more likely to support investment in public transport; retrofitting; offshore energy; and native tree growth. UK residents are more likely to support nuclear energy in particular.

Investments would like to see for a sustainable future



Q8. 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? You can give up to three answers.
(Base: all adults aged 18+)



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