



Eden McCallum UK Consumer Survey

Environmental Sustainability – Consumer perspectives

November 2021

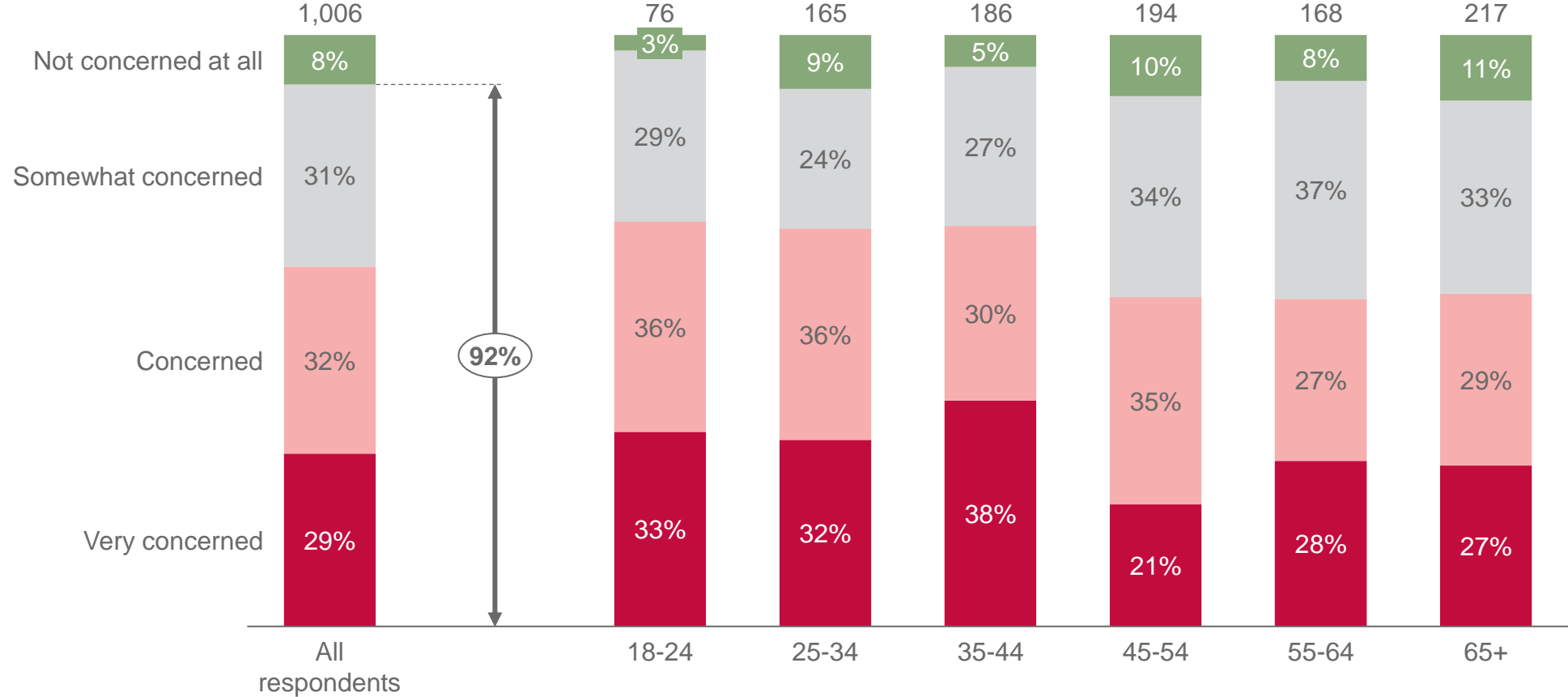
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Levels of concern about the environment are high across age groups

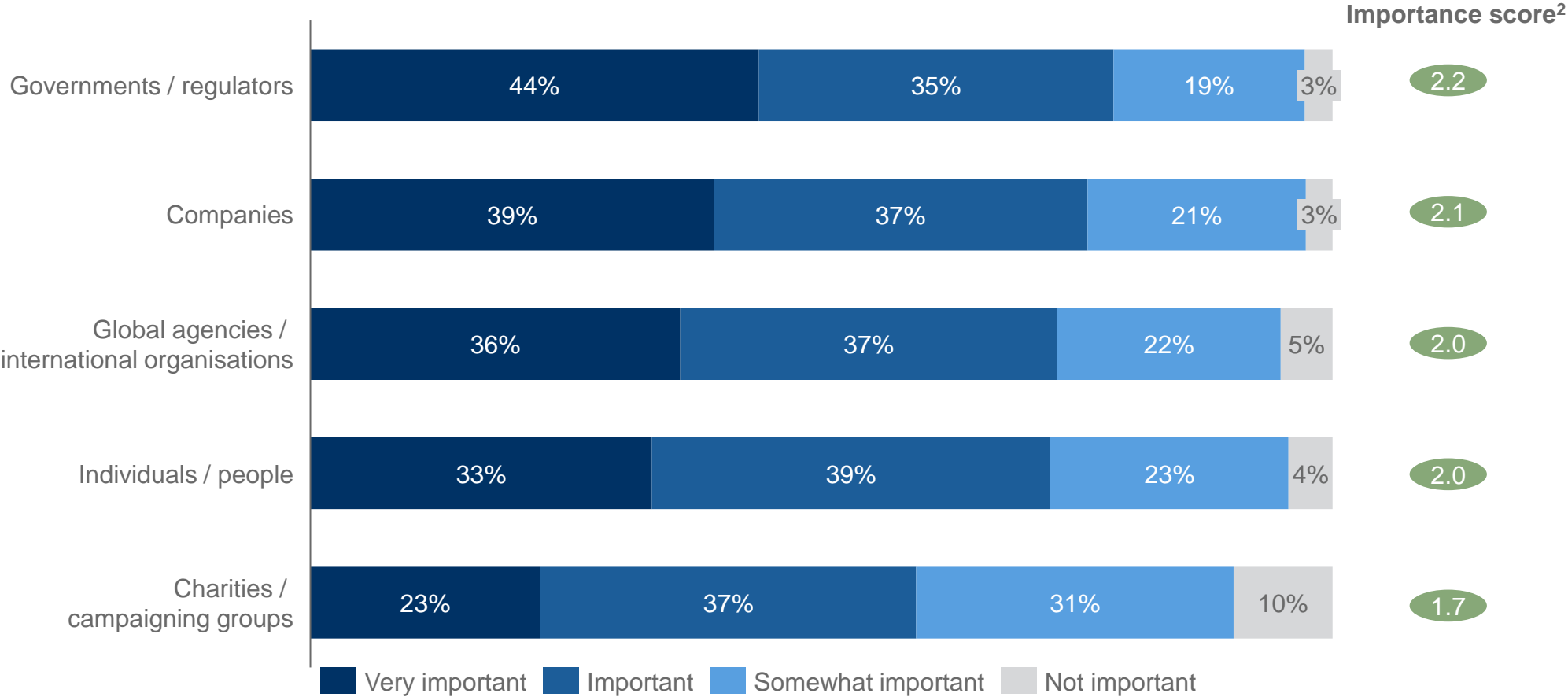
UK ENVIRONMENTAL SUSTAINABILITY: ENVIRONMENTAL CONCERN¹



Note: 1) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer Research Survey October 2021 (n = 1006) SQ9: How concerned are you about the environment / sustainability?

People believe their individual actions have an important impact on the environment, almost equal to governments, companies and global agencies

UK ENVIRONMENTAL SUSTAINABILITY: IMPACT ON THE ENVIRONMENT / SUSTAINABILITY¹

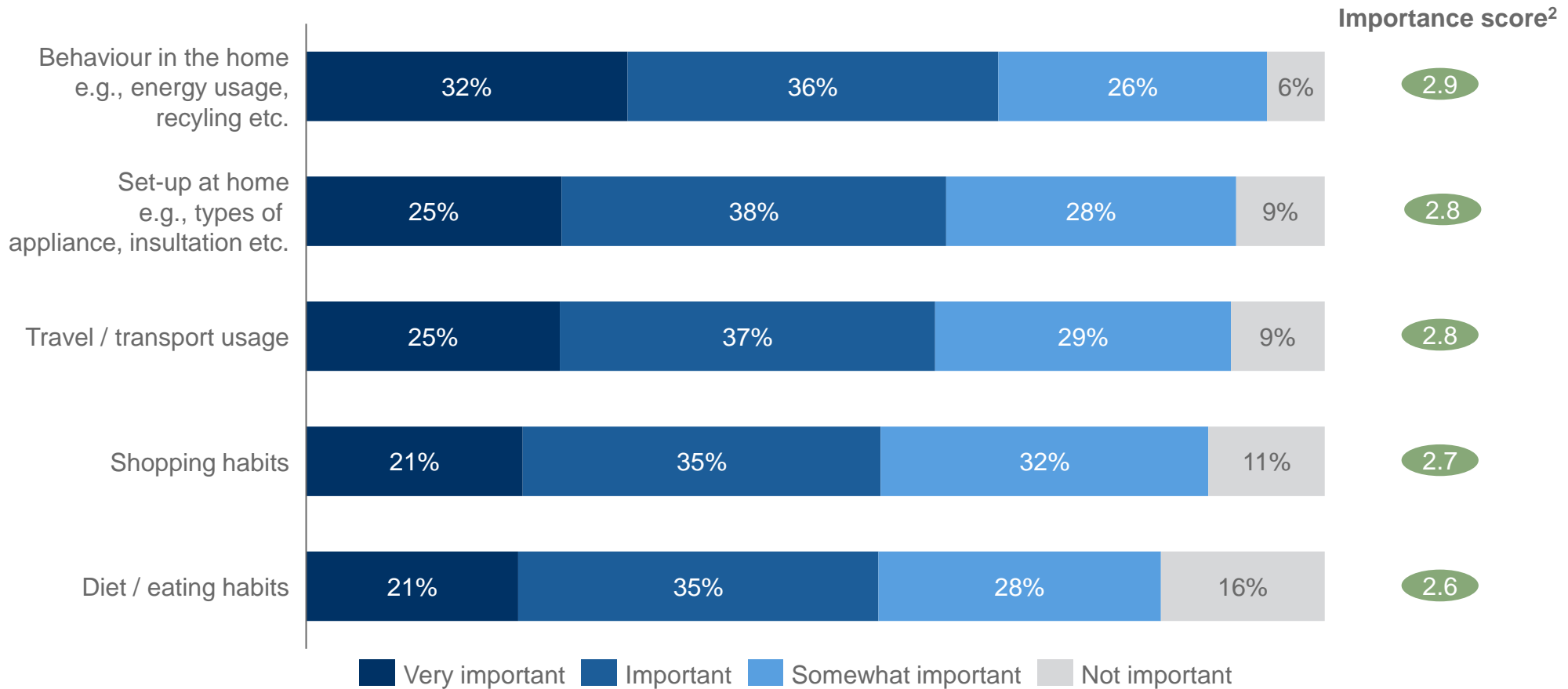


Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Importance score calculated by assigning a numerical value to each answer code where 'Very important' = 3, 'Important' = 2, 'Somewhat important' = 1, 'Not important' = 0

Source: EM Consumer Research Survey October 2021 (n = from 982 to 1000) SQ10: How important do you think each of the following are in terms of the impact they have on the environment / sustainability?

When it comes to their personal behavior, consumers view their activities in the home as having the greatest environmental impact

UK ENVIRONMENTAL SUSTAINABILITY: IMPORTANCE OF PERSONAL BEHAVIOUR ON ENVIRONMENTAL IMPACT¹

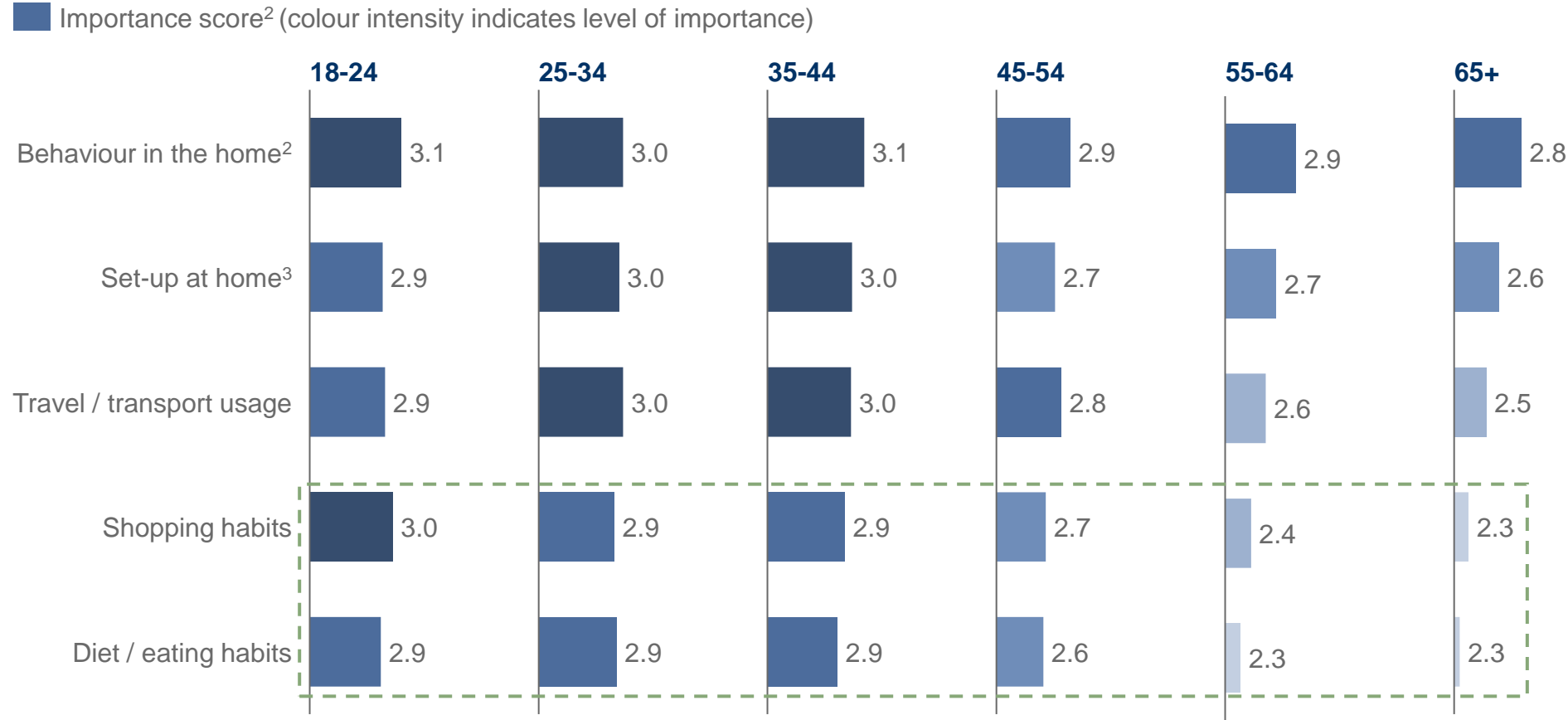


Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Importance score calculated by assigning a numerical value to each answer code where 'Not important' = 1, 'Somewhat important' = 2, 'Important' = 3 and 'Very important' = 4

Source: EM Consumer Research Survey October 2021 (n = from 988 to 1008) SQ11: How important do you think each your personal behaviour in each of the following areas is in terms of its impact on the environment / sustainability?

However, views on the impact of different behaviours varies by age group; younger generations attach more importance to shopping and eating habits

UK ENVIRONMENTAL SUSTAINABILITY: IMPORTANCE OF PERSONAL BEHAVIOUR ON ENVIRONMENTAL IMPACT¹

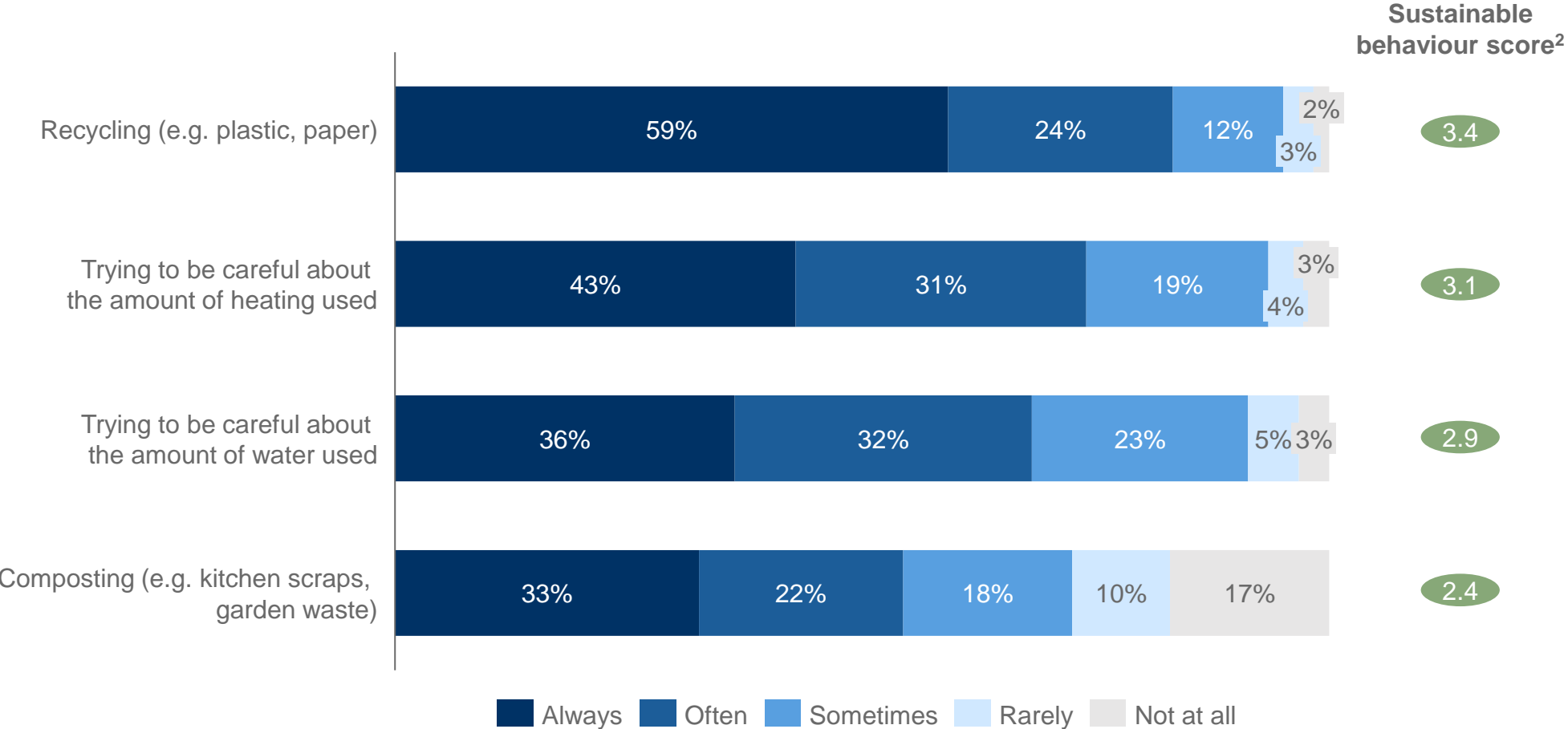


Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Importance score calculated by assigning a numerical value to each answer code where 'Not important' = 1, 'Somewhat important' = 2, 'Important' = 3 and 'Very important' = 4; 3) E.g., Energy usage, recycling etc.; 4) E.g., Types of appliance, use of insulation etc.; Source: EM Consumer Research Survey October 2021 (n = from 983 to 1003) SQ11: How important do you think your personal behaviour in each of the following areas is in terms of its impact on the environment / sustainability?

In the home, recycling and watching energy usage are the most common actions people are taking



UK ENVIRONMENTAL SUSTAINABILITY: EXTENT OF SUSTAINABLE BEHAVIOUR AT HOME¹



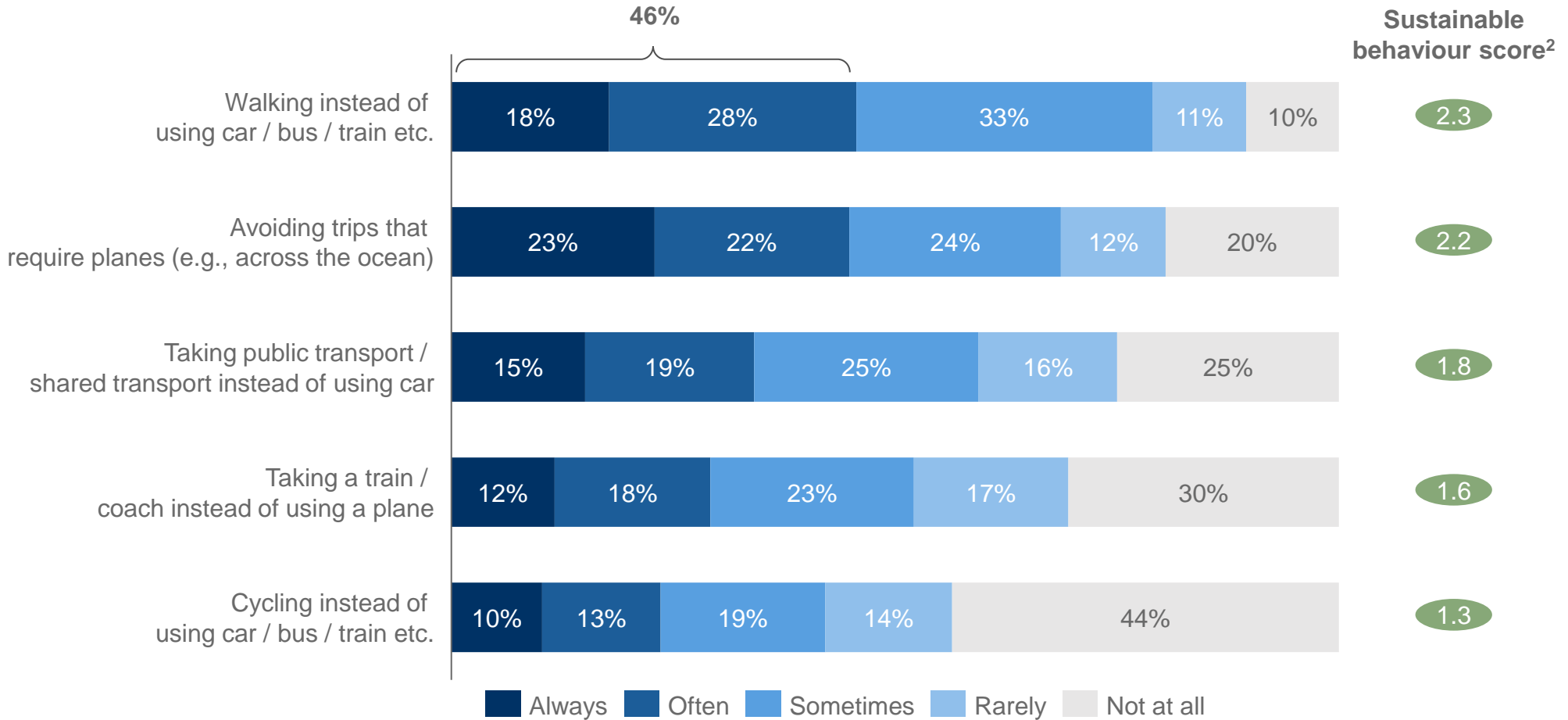
Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Sustainable behaviour score calculated by assigning a numerical value to each answer code where 'Always' = 4, 'Often' = 3, 'Sometimes' = 2, 'Rarely' = 1, 'Not at all' = 0

Source: EM Consumer Research Survey October 2021 (n = from 956 to 1015) SQ12: To what extent are you doing each of the following at home?

When travelling, almost half of UK consumers always/often walk as an alternative to using a car, bus, or train



UK ENVIRONMENTAL SUSTAINABILITY: EXTENT OF TRAVELING MORE SUSTAINABLY¹



Note: 1) Excludes those who answered 'I don't know / doesn't apply' 2) Sustainable behaviour score calculated by assigning a numerical value to each answer code where 'Always' = 4, 'Often' = 3, 'Sometimes' = 2, 'Rarely' = 1, 'Not at all' = 0

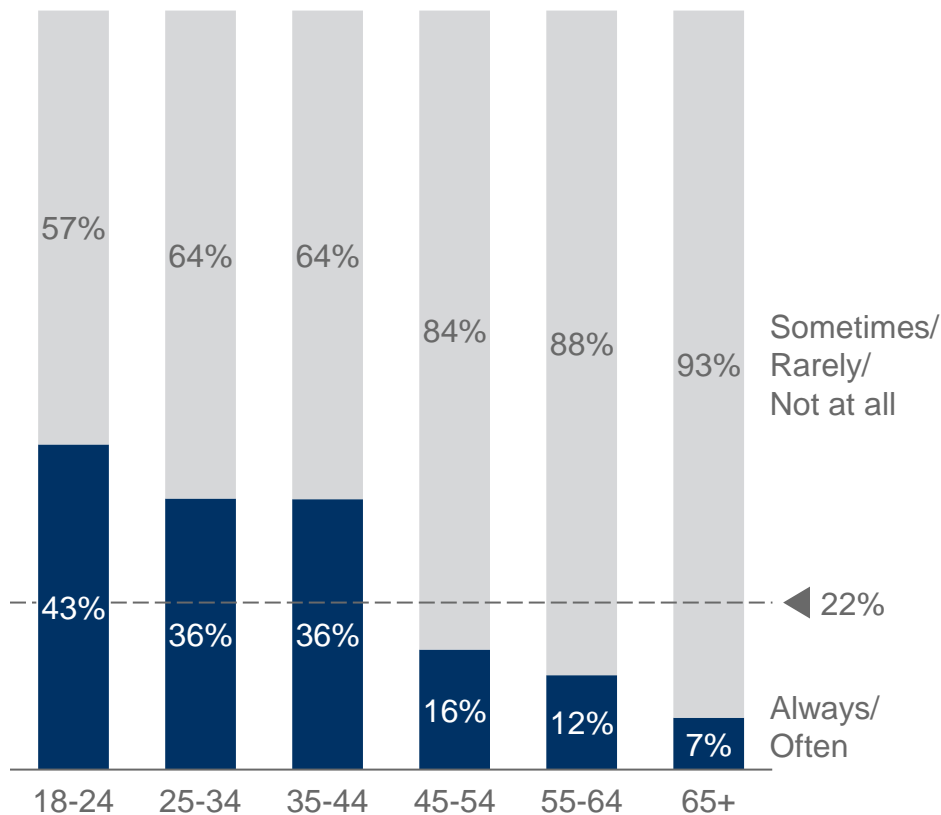
Source: EM Consumer Research Survey October 2021 (n = from 781 to 995) SQ14: To what extent are you doing each of the following for your transport / travel?

Younger respondents are more likely to be seeking out alternative modes of transport

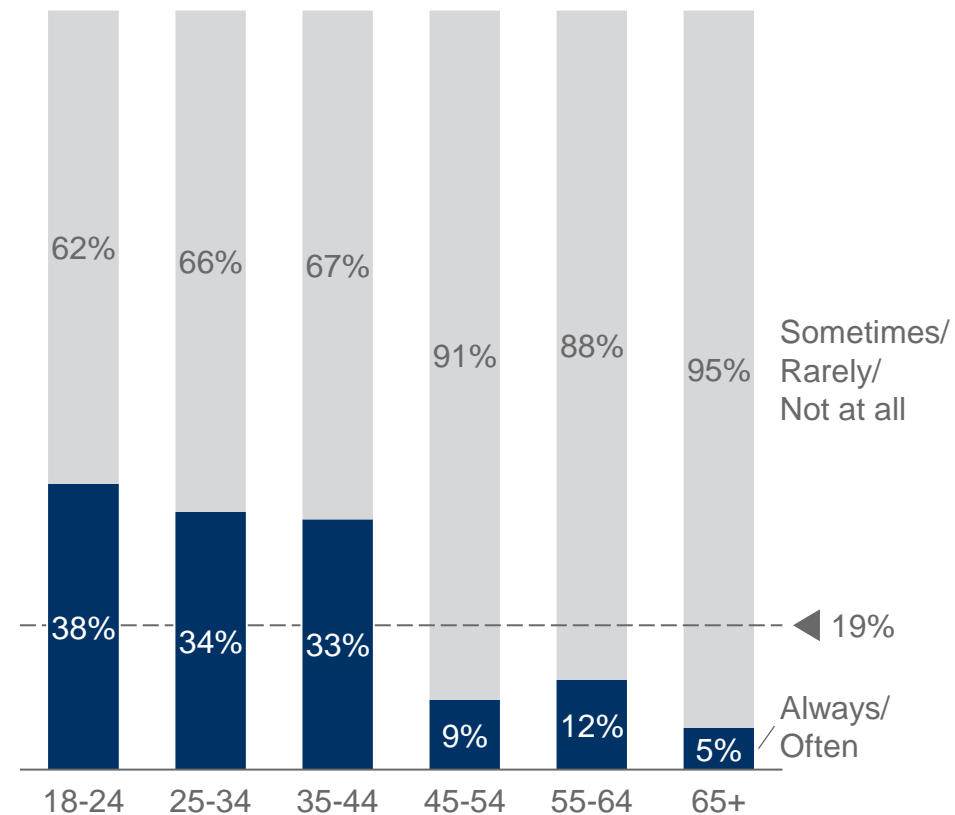


UK ENVIRONMENTAL SUSTAINABILITY: EXTENT OF TRAVELING MORE SUSTAINABLY¹

Taking a train / coach instead of using a plane



Cycling instead of using car / bus / train



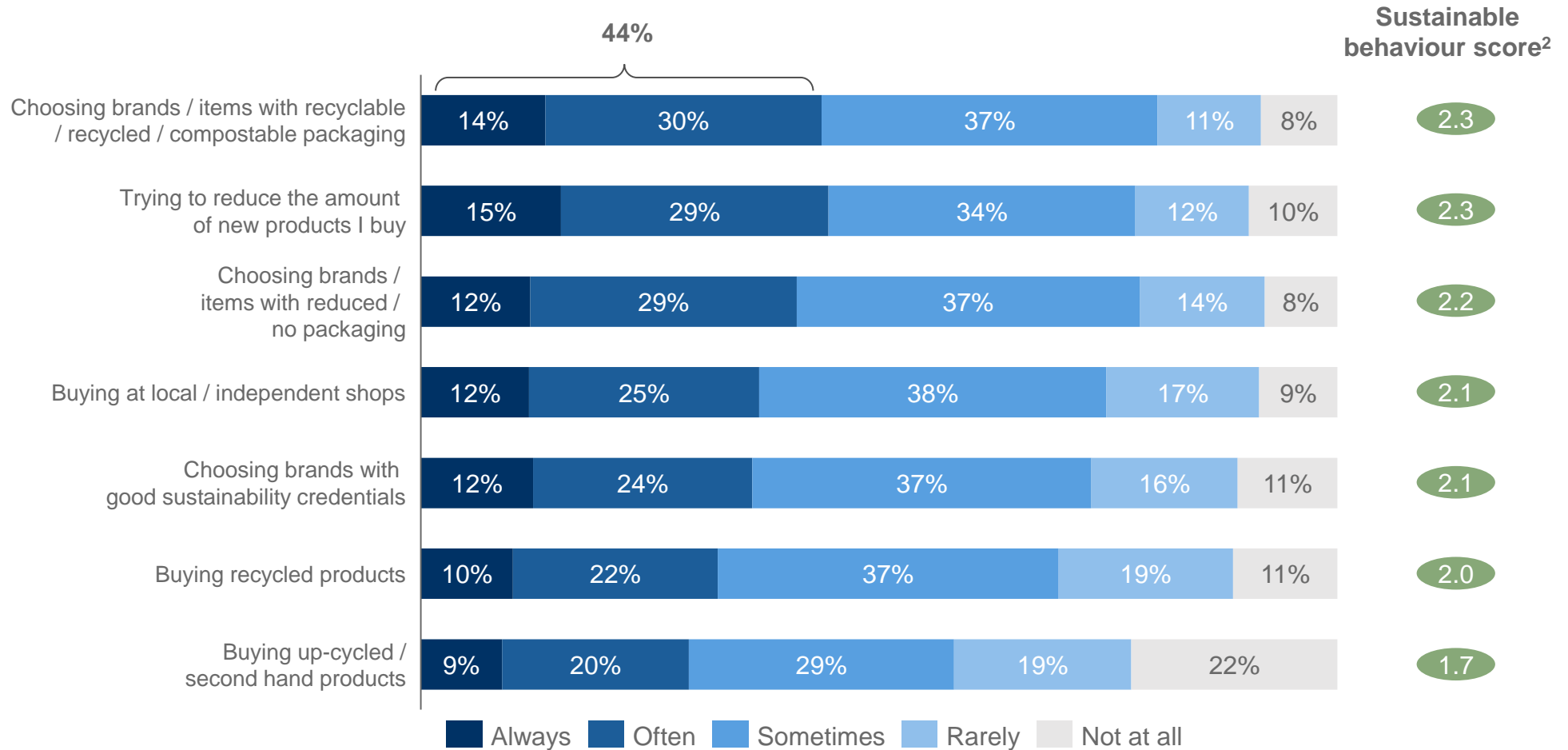
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2021 (n = from 779 to 835) SQ14: To what extent are you doing each of the following for your transport / travel?

When shopping, just under half of UK consumers regularly opt for brands with sustainable packaging or simply try to buy fewer new products



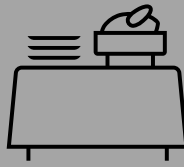
UK ENVIRONMENTAL SUSTAINABILITY: EXTENT OF BUYING MORE SUSTAINABLY¹



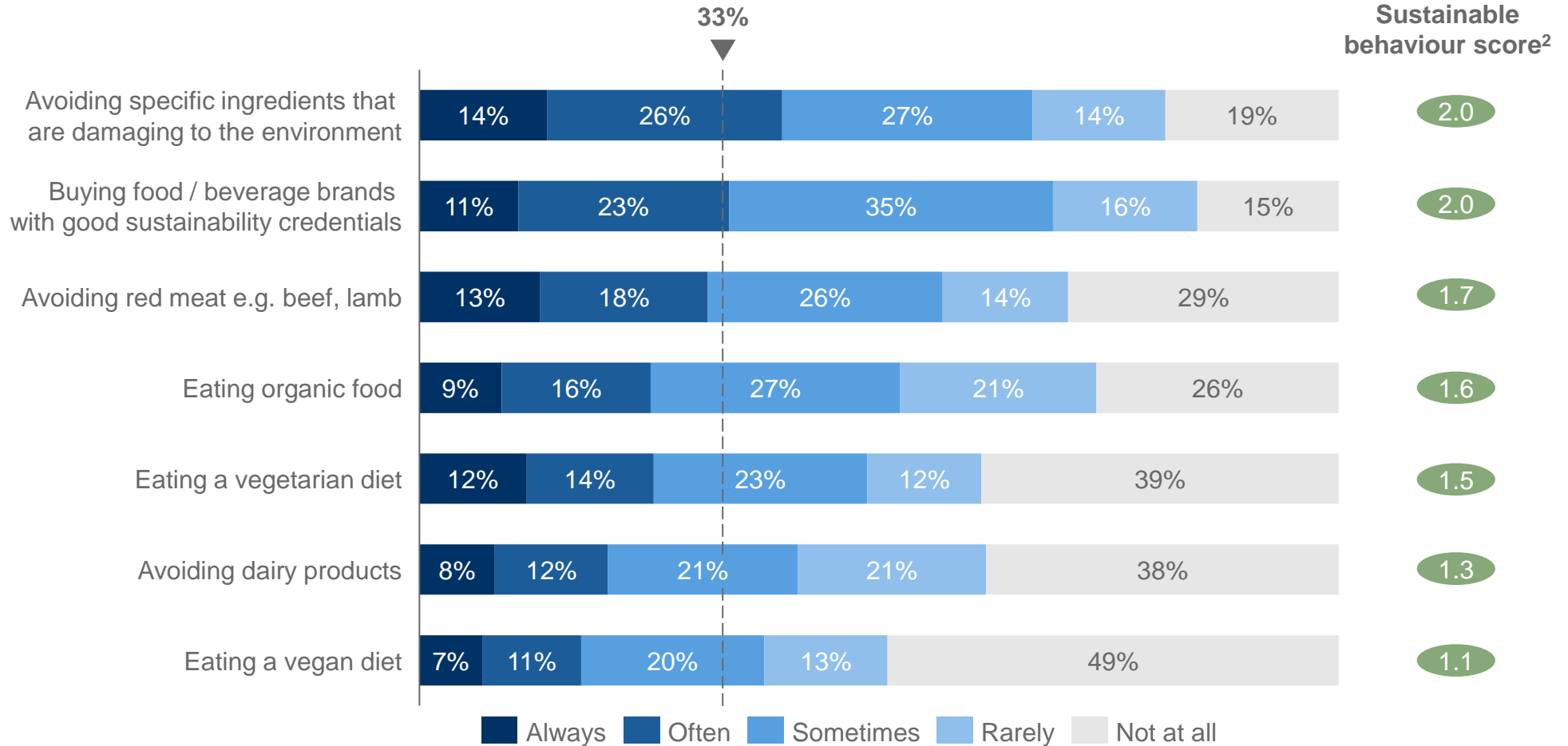
Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Sustainable behaviour score calculated by assigning a numerical value to each answer code where 'Always' = 4, 'Often' = 3, 'Sometimes' = 2, 'Rarely' = 1, 'Not at all' = 0

Source: EM Consumer Research Survey October 2021 (n = from 965 to 1008) SQ15: To what extent are you doing each of the following when shopping?

When eating, about 1/3rd of UK consumers try to avoid specific damaging ingredients and look for brands with good sustainability credentials



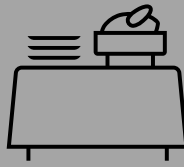
UK ENVIRONMENTAL SUSTAINABILITY: EXTENT OF EATING MORE SUSTAINABLY¹



Note: 1) Excludes those who answered 'I don't know / doesn't apply'; 2) Sustainable behaviour score calculated by assigning a numerical value to each answer code where 'Always' = 4, 'Often' = 3, 'Sometimes' = 2, 'Rarely' = 1, 'Not at all' = 0

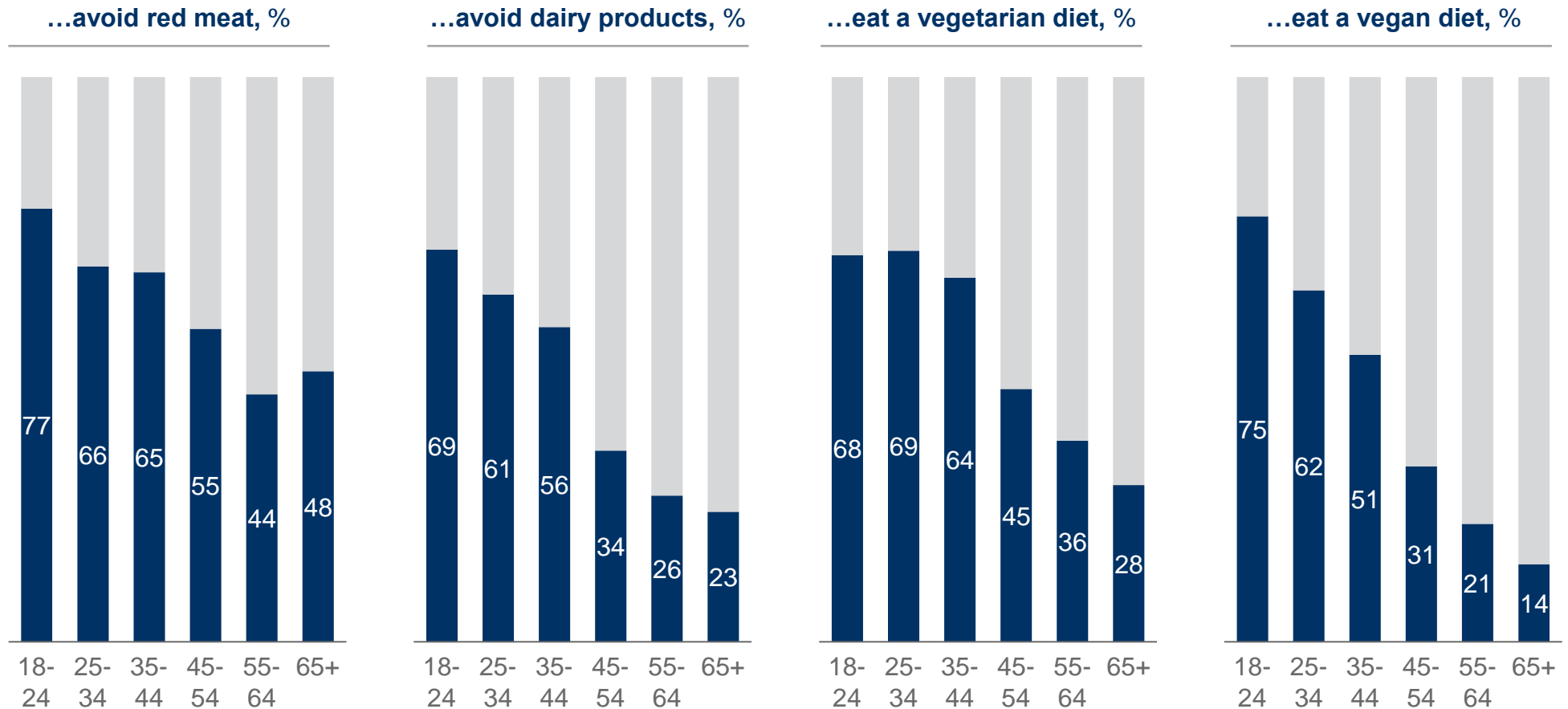
Source: EM Consumer Research Survey October 2021 (n = from 955 to 999) SQ16: To what extent are you doing each of the following for your eating habits / diet?

Younger respondents are more likely to have cut out specific food groups entirely



UK ENVIRONMENTAL SUSTAINABILITY: EXTENT OF EATING MORE SUSTAINABLY¹

People who sometimes to always...



Note: 1) Excludes those who answered 'I don't know / doesn't apply'

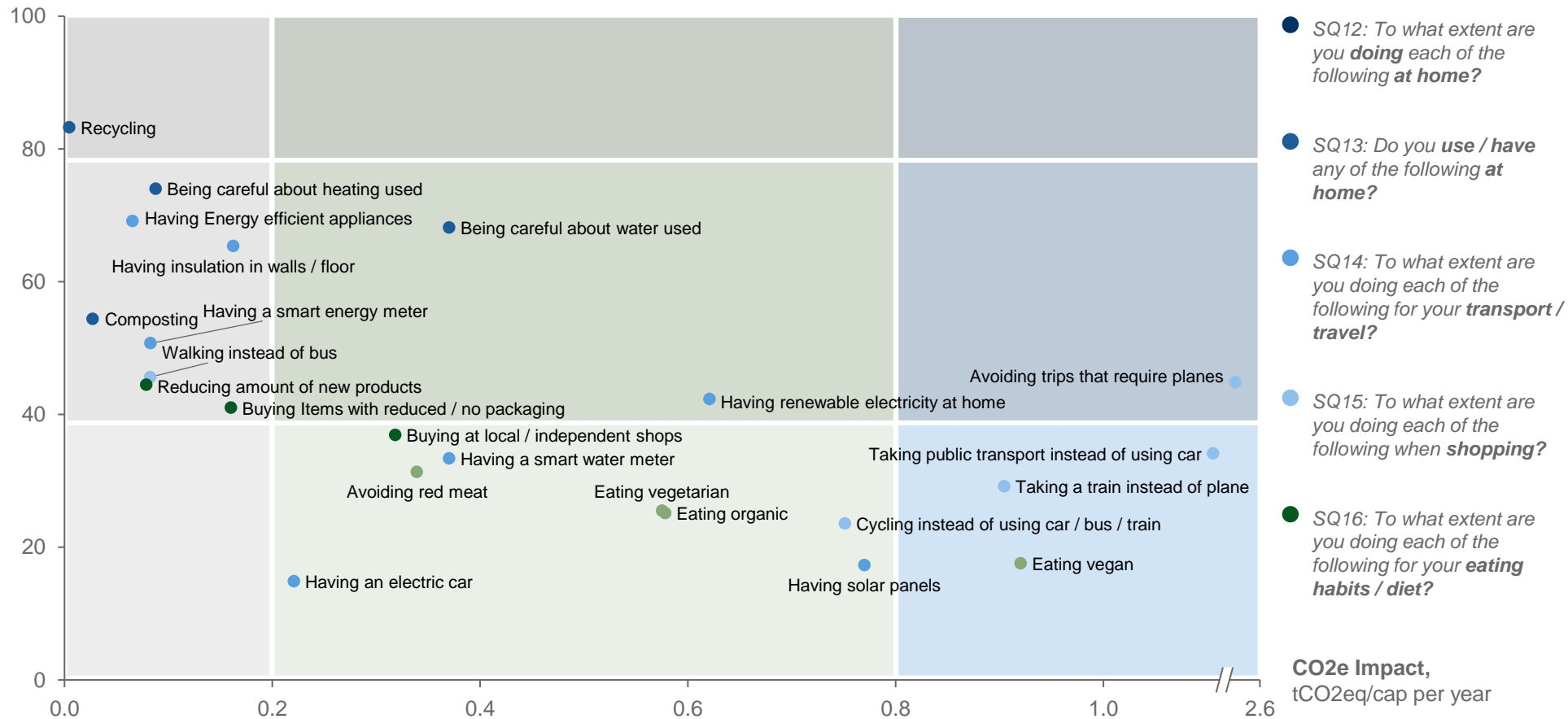
Source: EM Consumer Research Survey October 2021 (n = from 973 to 994) SQ16: To what extent are you doing each of the following for your eating habits / diet?



The climate change mitigation options with the highest impact still have a relatively low penetration

UK ENVIRONMENTAL SUSTAINABILITY: PENETRATION OF SUSTAINABLE ALTERNATIVES VS CO₂EQ IMPACT¹

Penetration², %



- SQ12: To what extent are you **doing** each of the following **at home**?
- SQ13: Do you **use / have** any of the following **at home**?
- SQ14: To what extent are you **doing** each of the following for your **transport / travel**?
- SQ15: To what extent are you **doing** each of the following when **shopping**?
- SQ16: To what extent are you **doing** each of the following for your **eating habits / diet**?

Note: 1) Excludes those who answered 'I don't know / doesn't apply' 2) % of respondents who always/often buy/use/eat sustainable alternatives or use/have sustainable solution at home

Source: EM Consumer Research Survey October 2021 (n = from 781 to 1015)

EU/Europe data from: Quantifying the potential for climate change mitigation of consumption options - Diana Ivanova et al 2020 Environ. Res. Lett. 15

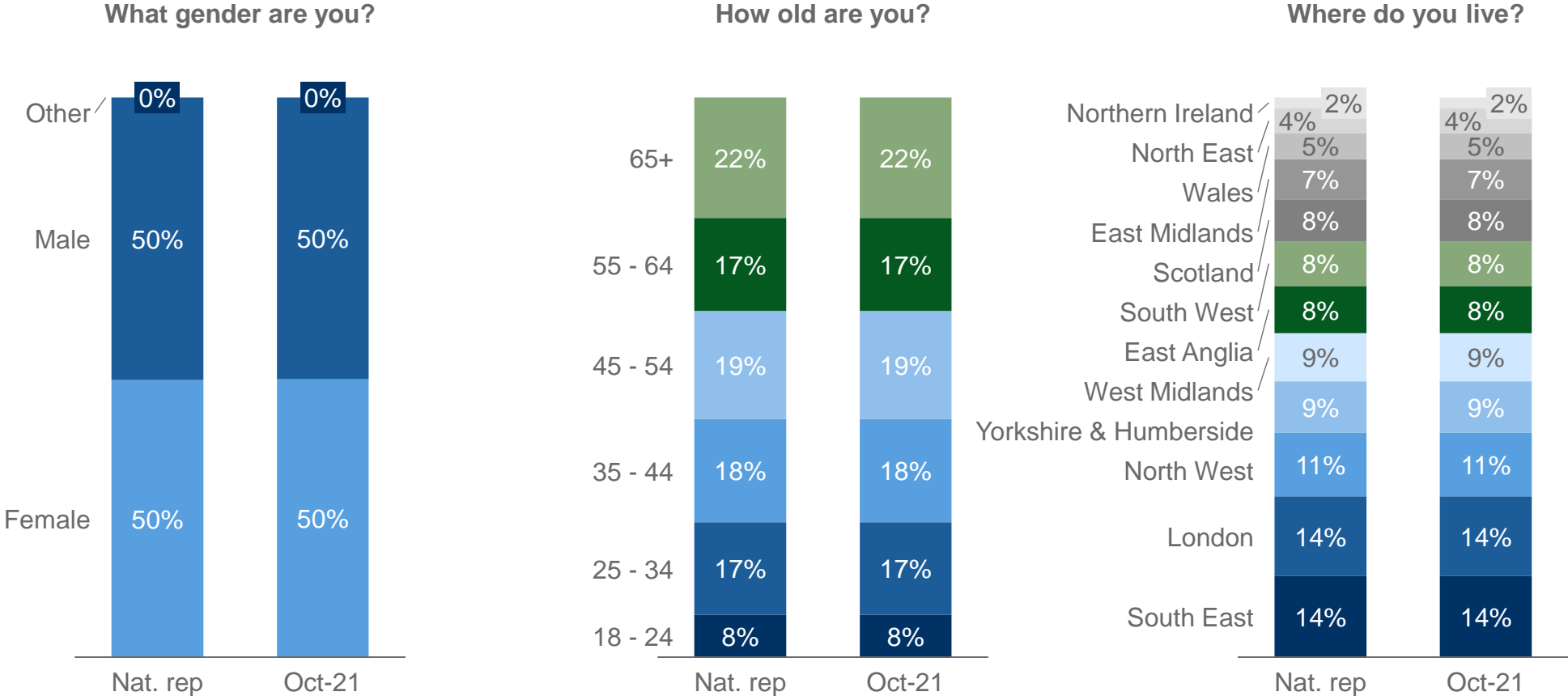
Contents



Sample demographics

The survey respondents are a nationally representative sample in terms of gender, age and regional distribution

KEY FACTS ABOUT THE UK SAMPLE¹



Note: 1) Totals may not equal 100% due to rounding. Respondents who answered 'other' or 'prefer not to say' have not been displayed
 Source: EM Consumer Research Survey October 2021 (n = 1023) S1: What gender do you identify as?; S2: How old are you?; S3: Where do you live?