

Eden McCallum NL Consumer Survey

Environmental Sustainability –
Consumer perspectives

November 2022



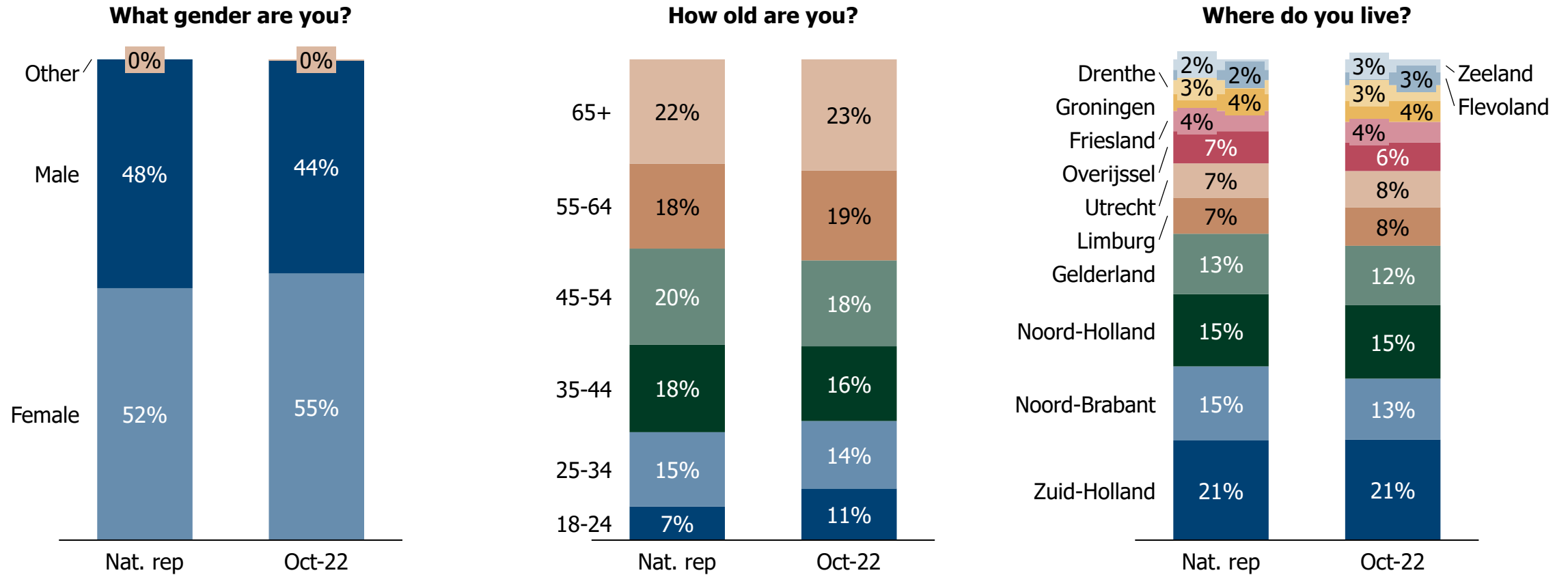
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The survey respondents are a nationally representative sample in terms of gender, age and regional distribution

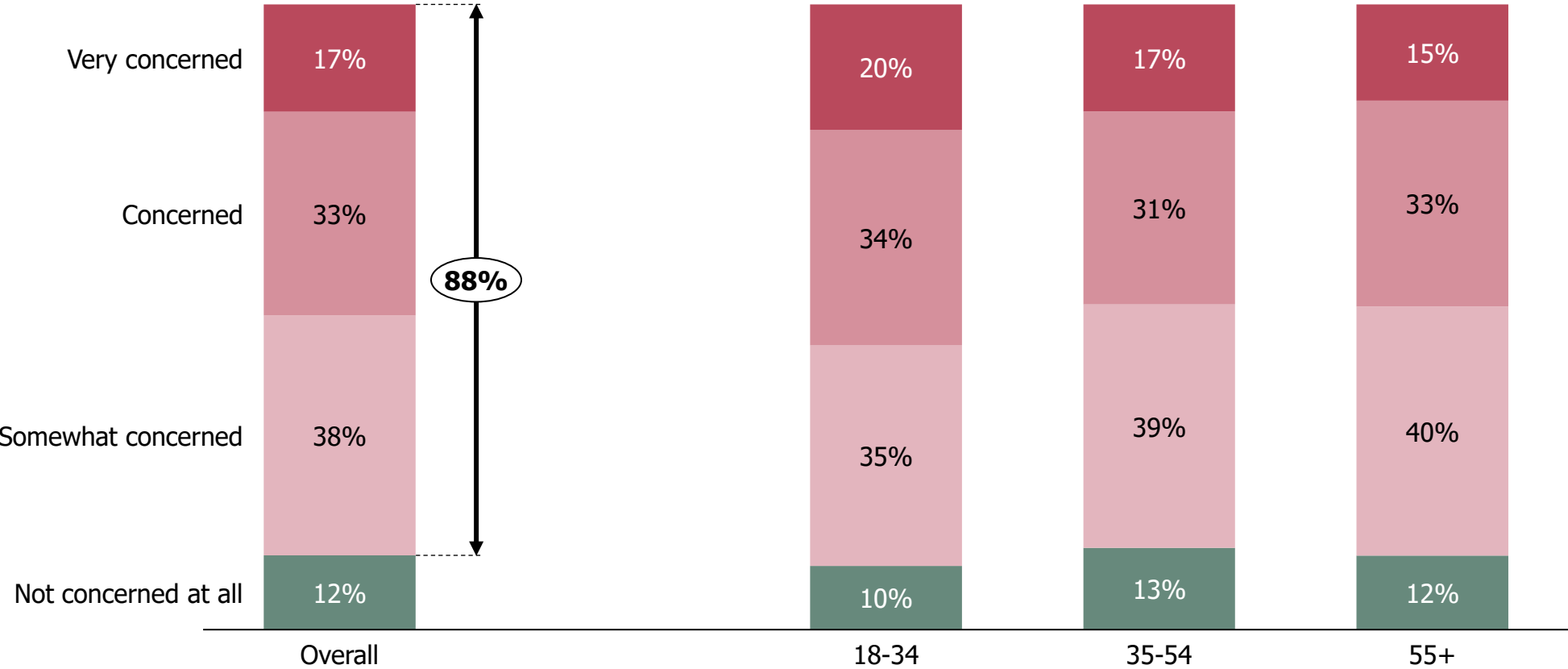
KEY FACTS ABOUT THE NL SAMPLE



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 2022 (n = 2,704 to 2,732) SQ1: What gender do you identify as?; SQ2: How old are you?; SQ3: Where do you live?

Levels of concern about the environment are high across age groups

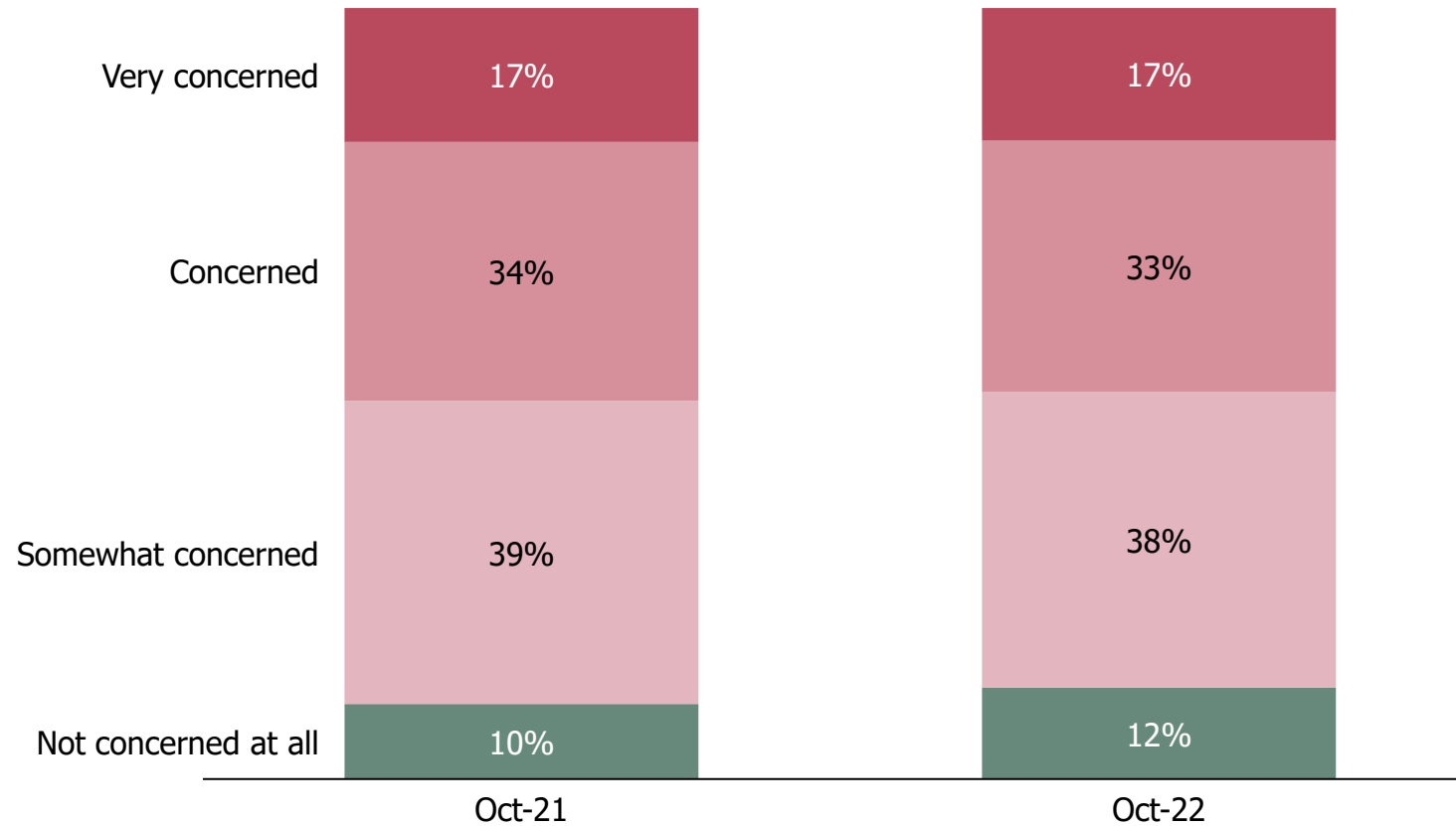
LEVEL OF CONCERN ABOUT ENVIRONMENT / SUSTAINABILITY



Note: 1) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer Research Survey October 2022 (n = 2,687) SQ9: How concerned are you about the environment / sustainability?

The picture has not changed significantly since we last asked the question in October 2021...

LEVEL OF CONCERN ABOUT ENVIRONMENT / SUSTAINABILITY 2021 VS. 2022

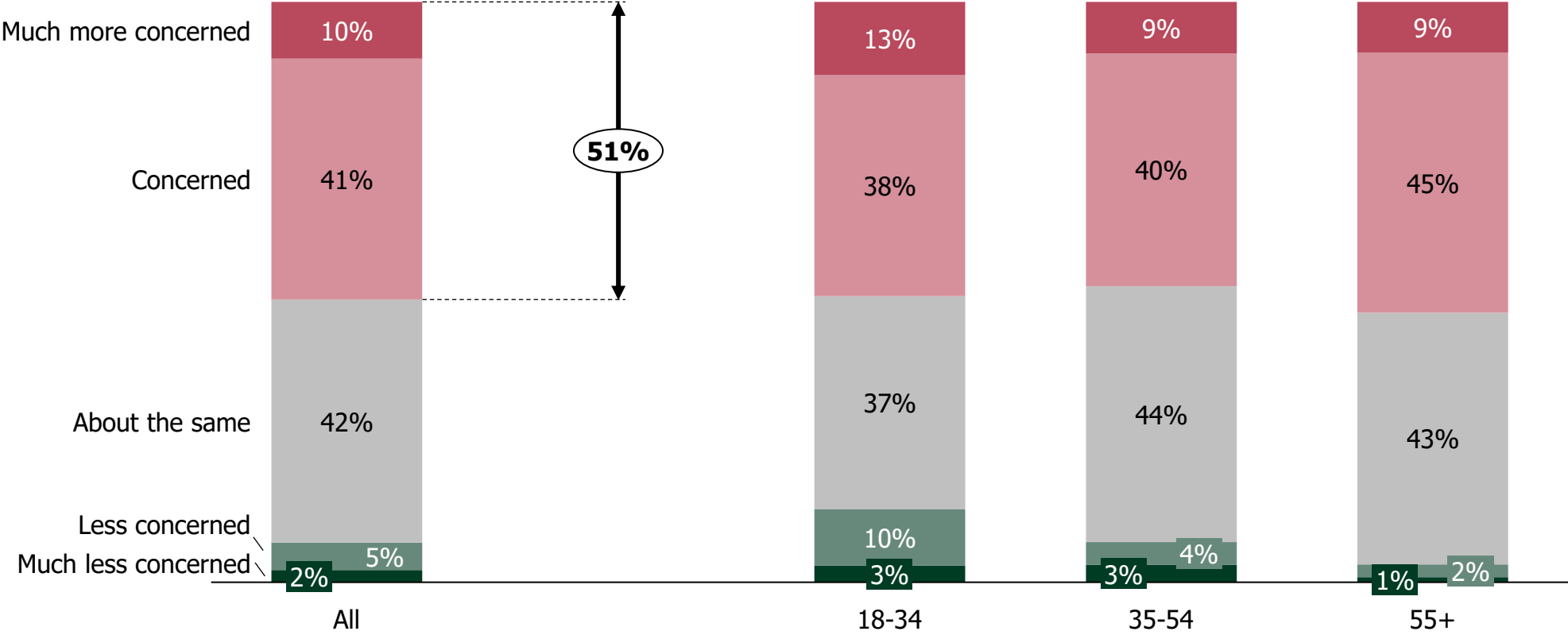


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = 2,687) October 2021 (n=1,007) SQ9: How concerned are you about the environment / sustainability?

...however, when asked directly if they are more concerned now than 1-2 years ago, half of respondents agreed

CHANGE IN CONCERN ABOUT ENVIRONMENT / SUSTAINABILITY VS. 1-2 YEARS AGO



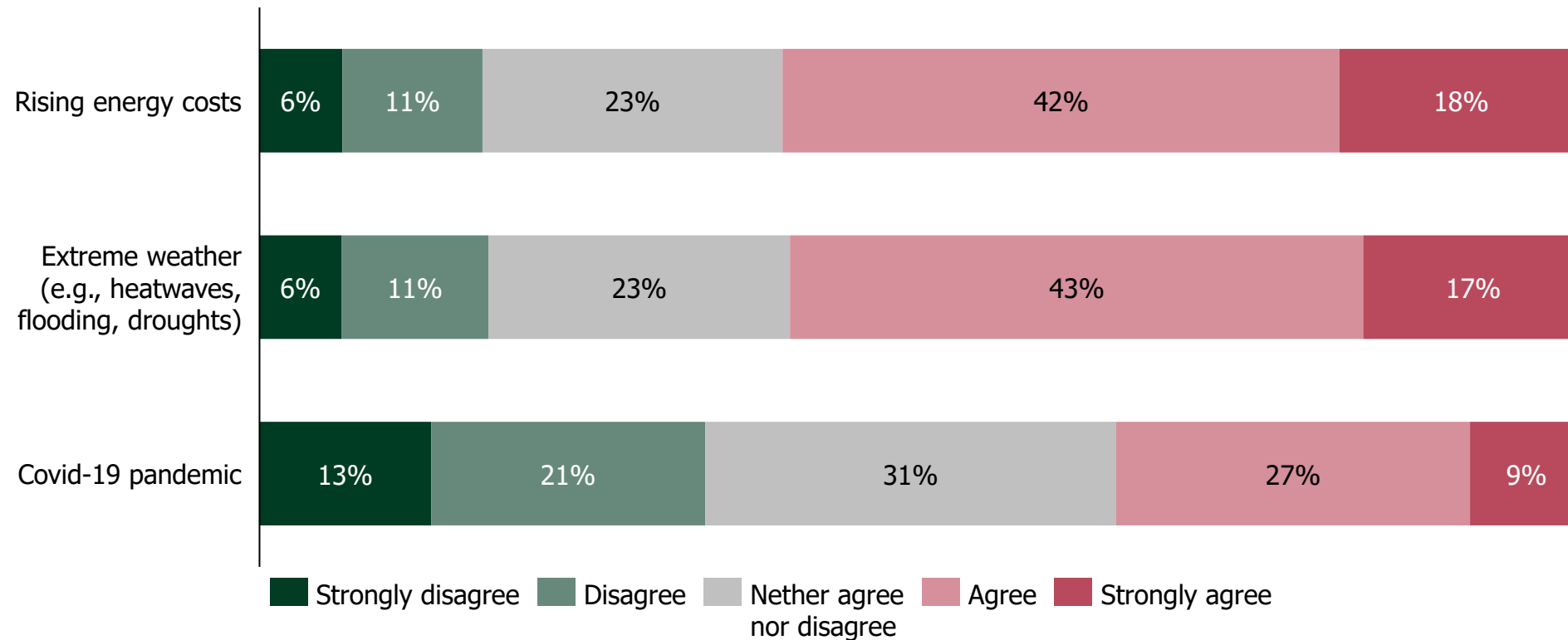
Note: 1) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer Research Survey October 2022 (n = 2,678) SQ19: Thinking about your level of concern about the environment / sustainability, how does this compare to how you felt 1-2 years ago?

c.60% of respondents also agreed that rising energy costs and extreme weather events have increased their concern about the environment

IMPACT OF SELECT FACTORS ON CONCERN ABOUT ENVIRONMENT / SUSTAINABILITY

To what extent do you agree or disagree with the following statements?

"[XXX] have / has made me more concerned about the environment / sustainability"

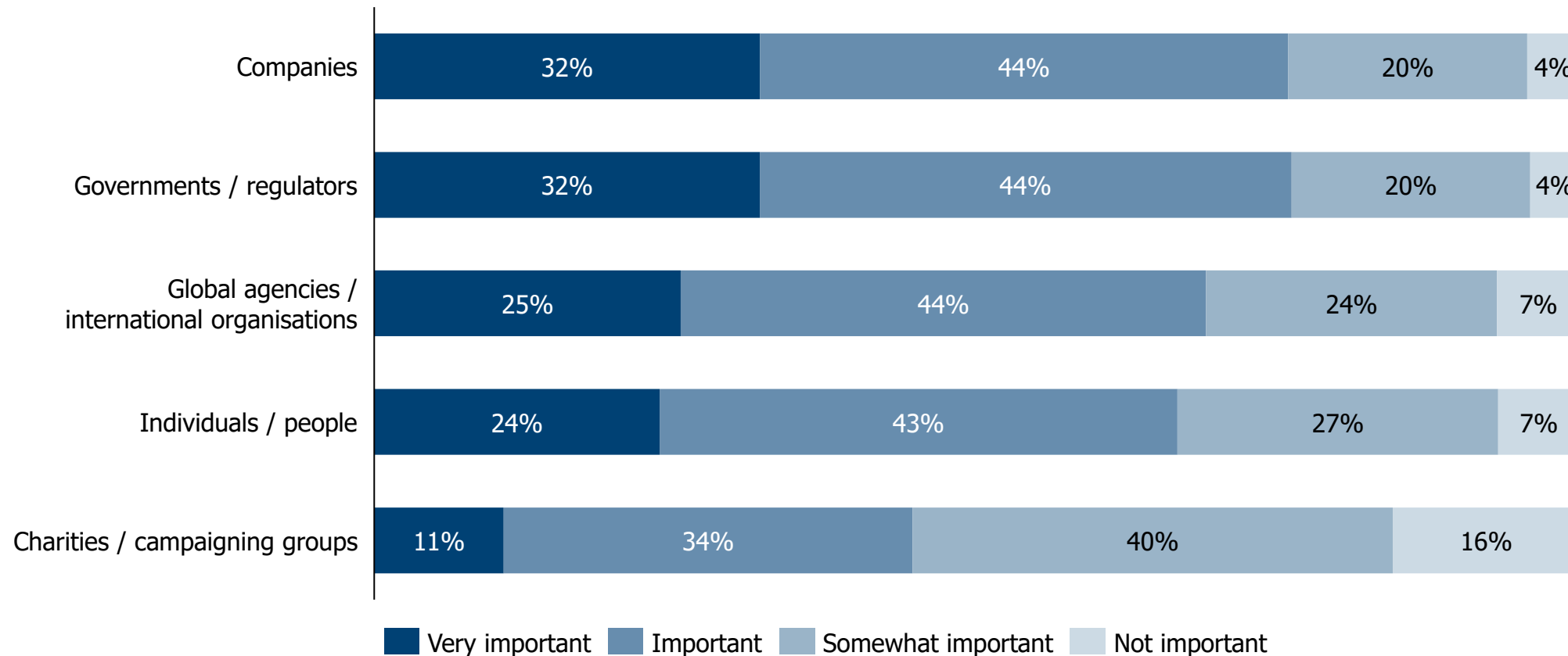


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = 2,676 to 2,682) SQ21: To what extent do you agree or disagree with the following statements?

Respondents believe that companies and governments / regulators have the most important impact when it comes to the environment

IMPACT OF DIFFERENT GROUPS ON ENVIRONMENT / SUSTAINABILITY



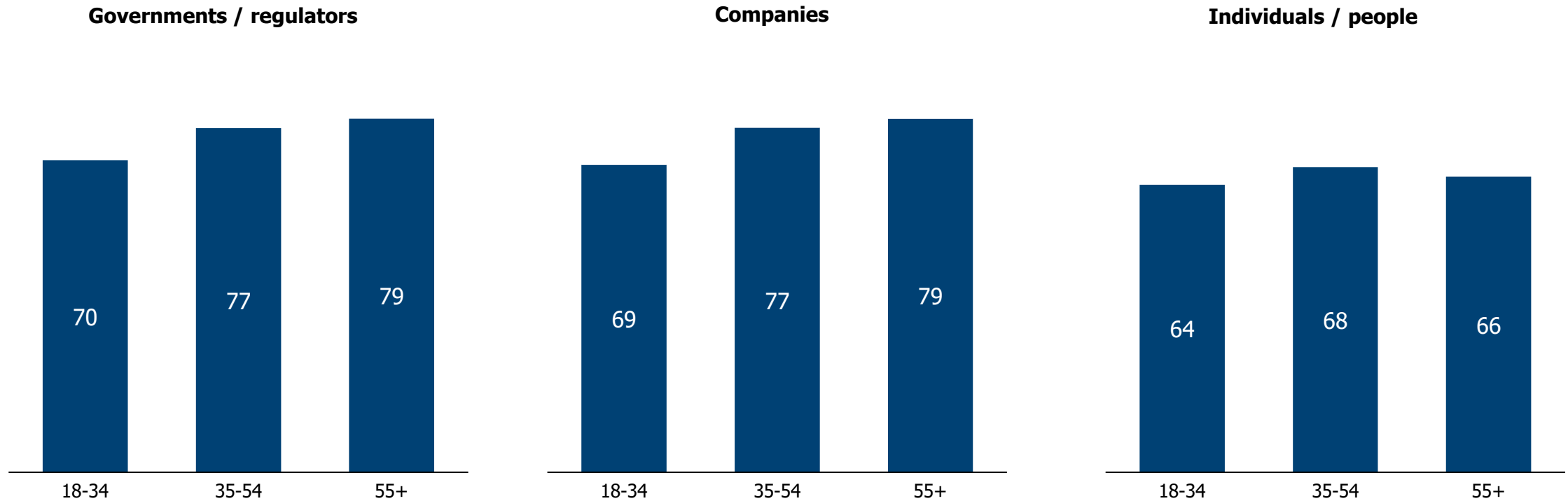
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,488 to 2,634) SQ10: How important do you think each of the following are in terms of the impact they have on the environment / sustainability?

Younger age groups are less likely to put faith in the influence of governments / regulators or companies

IMPACT OF DIFFERENT GROUPS ON ENVIRONMENT / SUSTAINABILITY BY RESPONDENT AGE GROUP

% rating each area as 'Very important' or 'Important'

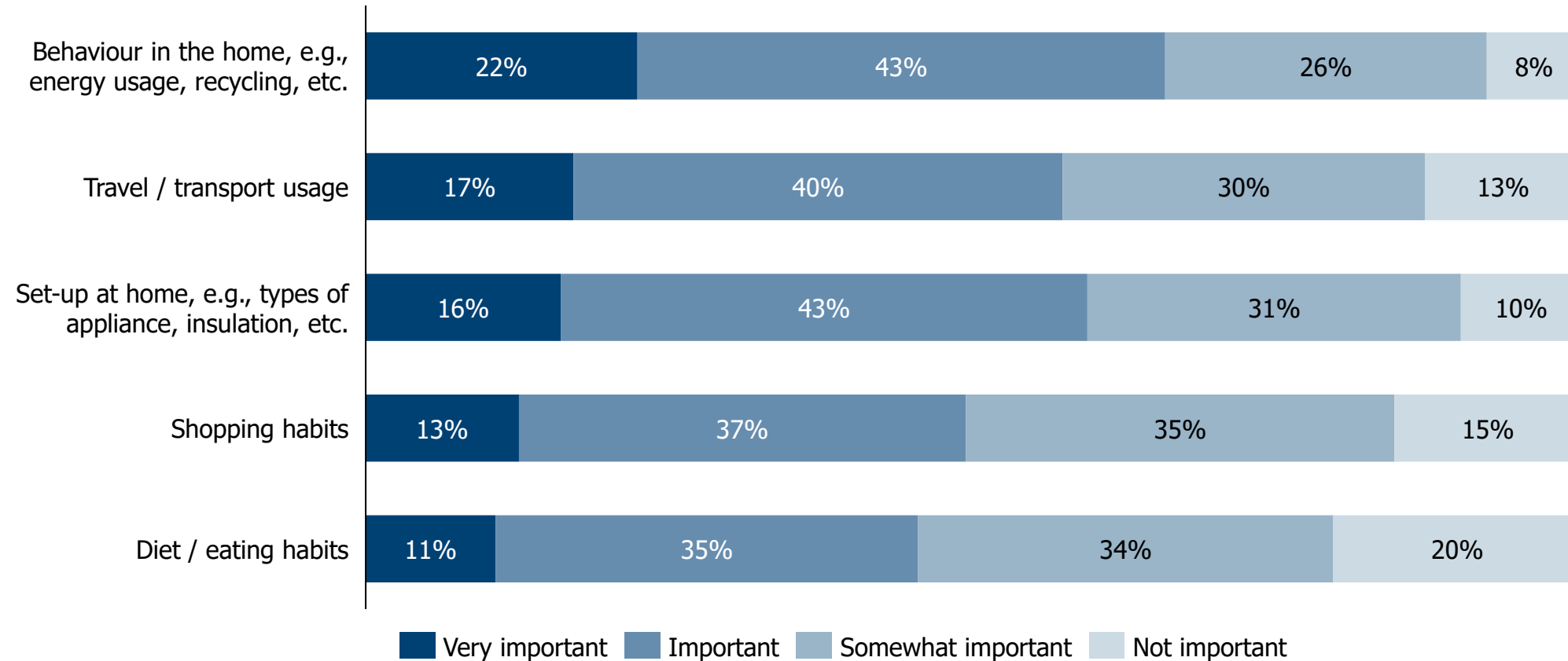


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,597 to 2,607) 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 behaviour, respondents view their activities in the home as having the greatest environmental impact

PERCEIVED IMPORTANCE OF PERSONAL BEHAVIOURS ON ENVIRONMENT / SUSTAINABILITY

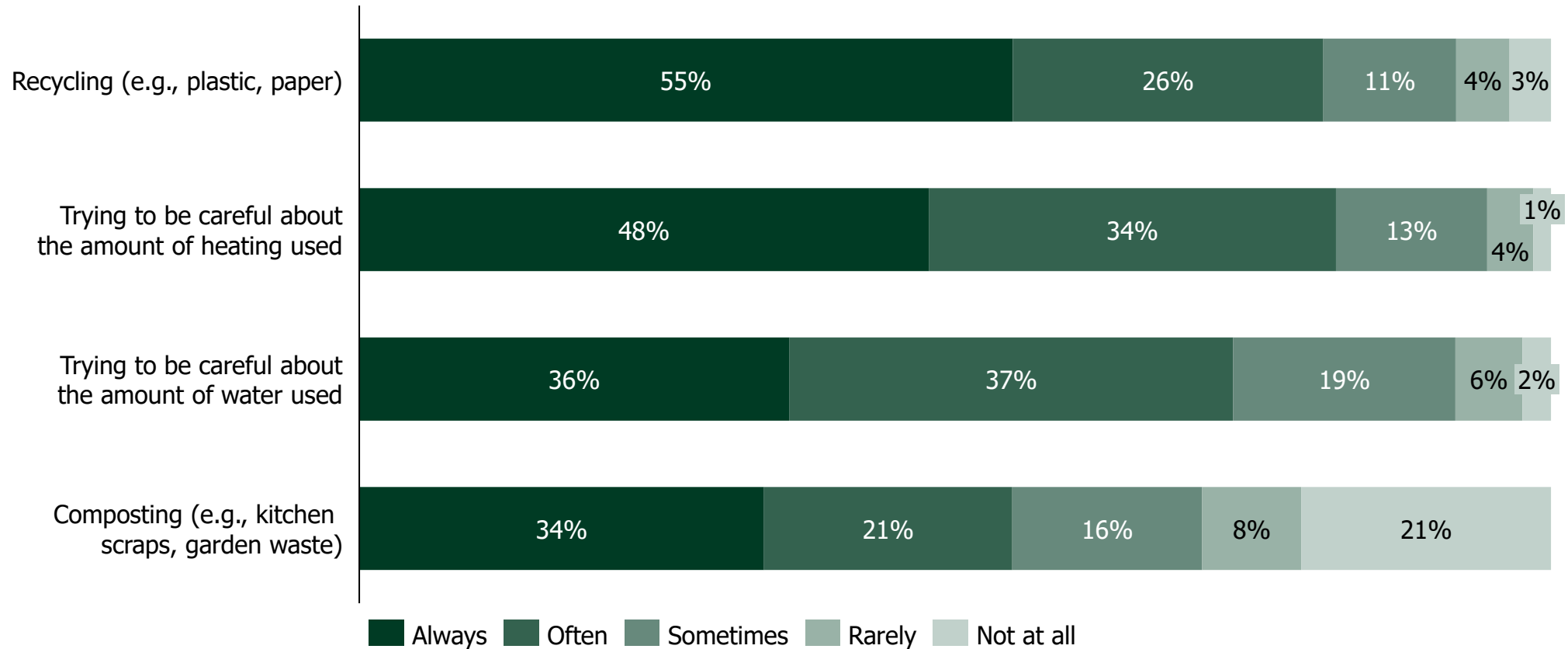


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,539 to 2,684) 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

UPTAKE OF PERSONAL BEHAVIOURS IN THE HOME

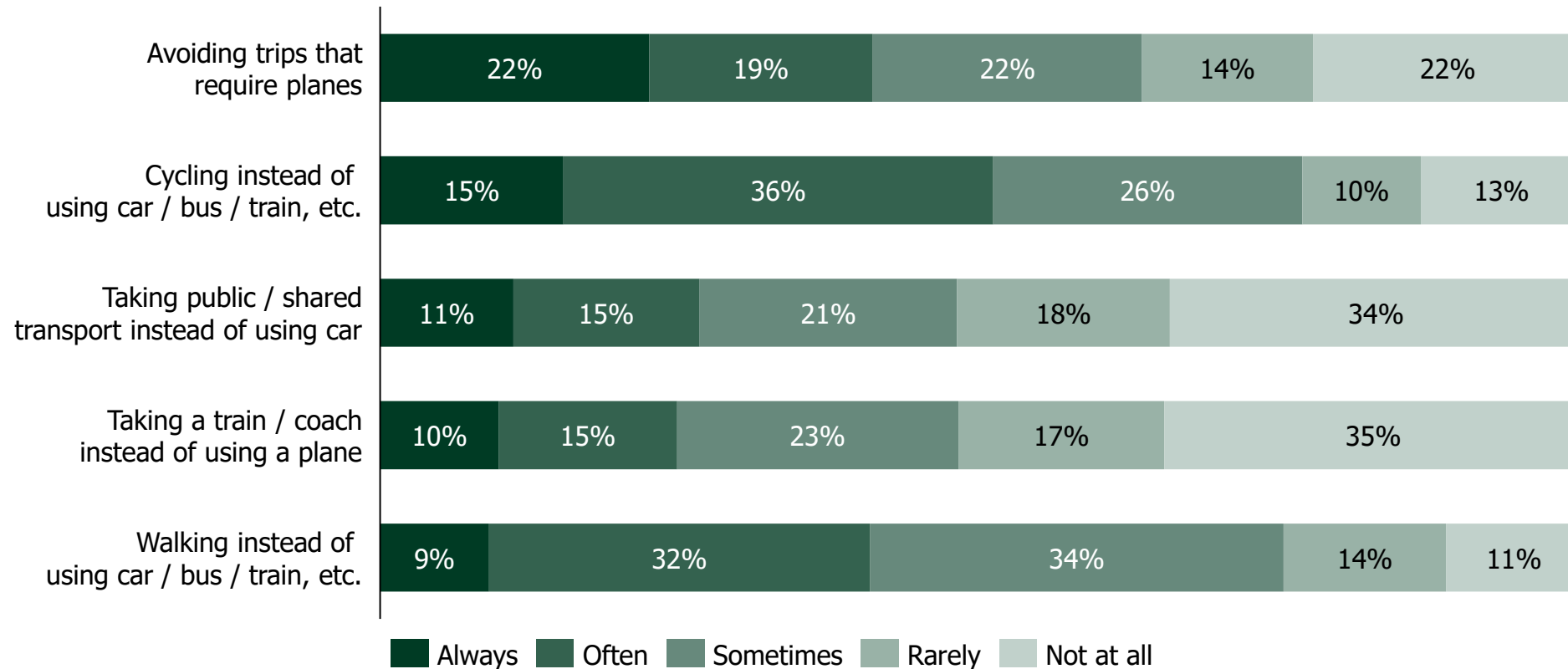


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,553 to 2,720) SQ12: To what extent are you doing each of the following at home?

When travelling, c.20% of respondents always avoid planes, but only 10% use alternative modes of transport instead of flying

UPTAKE OF PERSONAL BEHAVIOURS FOR TRAVEL

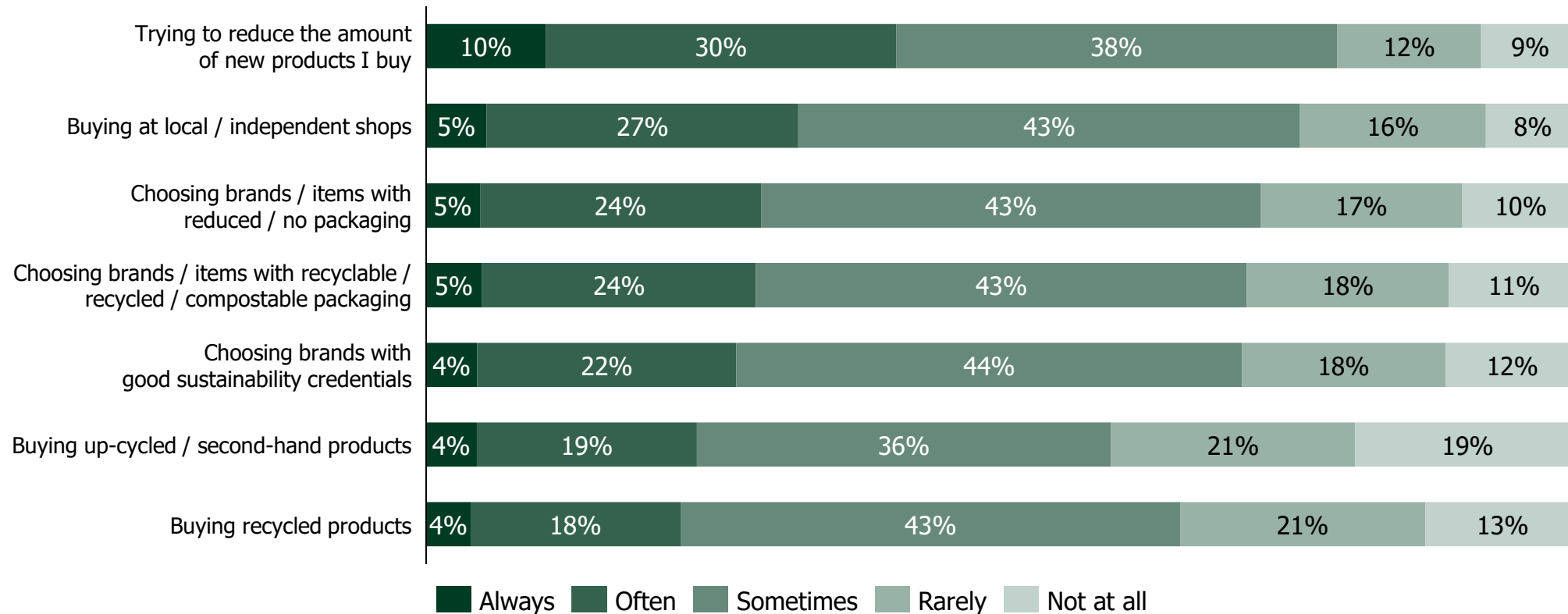


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,085 to 2,620) SQ14: To what extent are you doing each of the following for your transport / travel?

When shopping, c.40% of respondents regularly try to buy fewer new products, or buy at local / independent shops

UPTAKE OF PERSONAL BEHAVIOURS WHEN SHOPPING

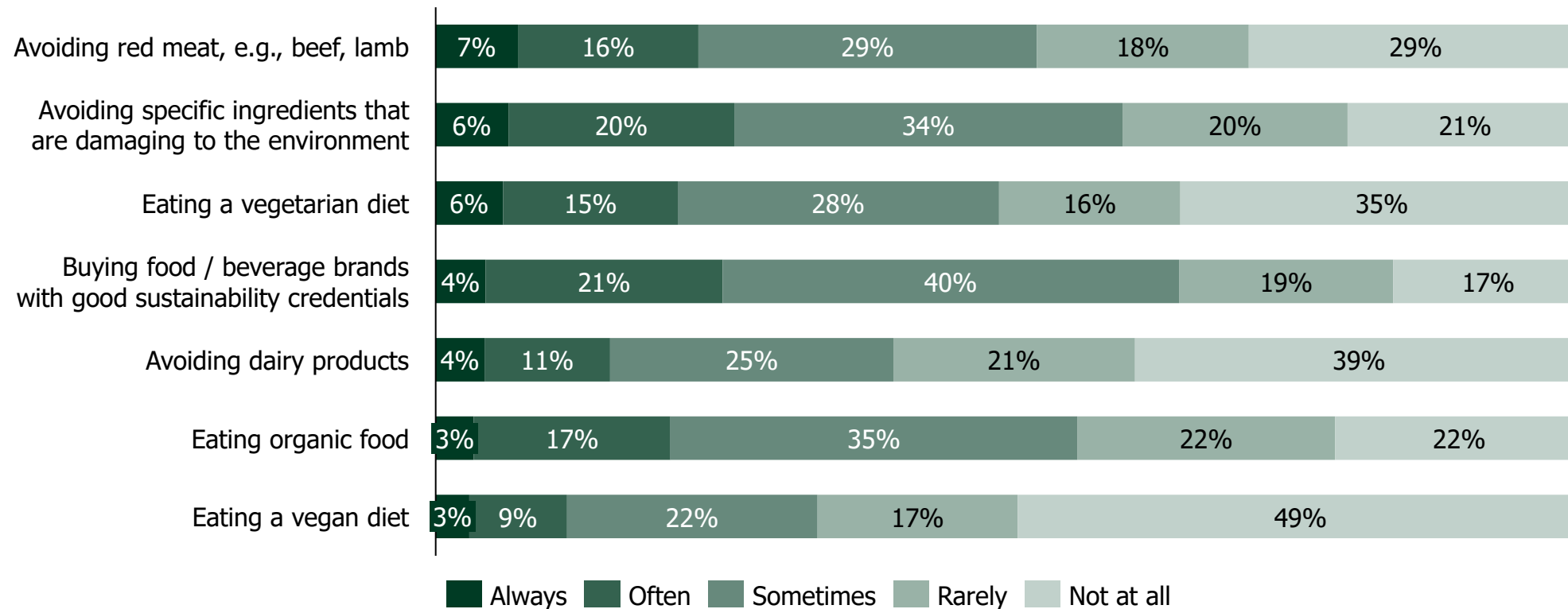


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,558 to 2,653) SQ15: To what extent are you doing each of the following when shopping?

When eating, about a quarter of respondents try to avoid red meat and specific damaging ingredients

UPTAKE OF PERSONAL BEHAVIOURS WHEN EATING



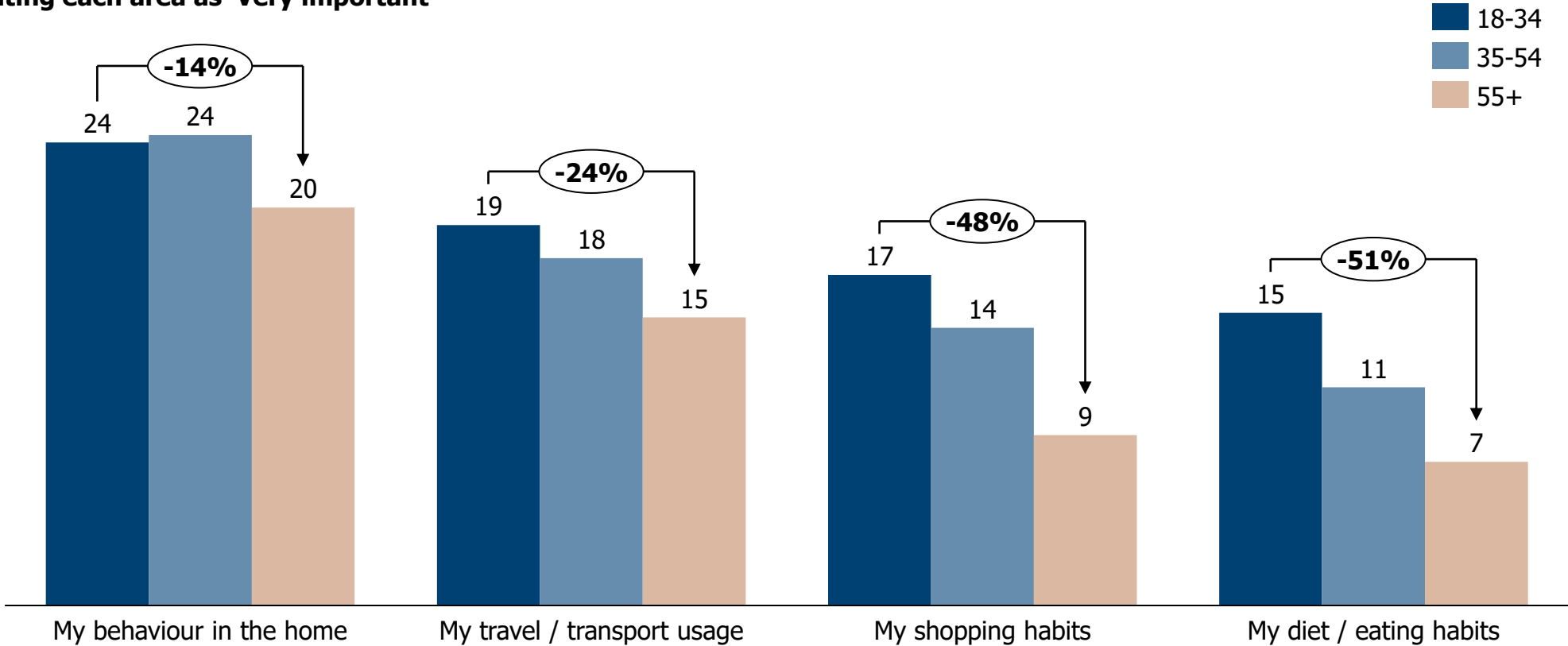
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,555 to 2,690) SQ16: To what extent are you doing each of the following for your eating habits / diet?

Generally, older respondents attach less importance to the impact of their actions in all areas tested, with the smallest difference for behaviours at home

PERCEIVED IMPORTANCE OF PERSONAL BEHAVIOURS BY AGE GROUP

% rating each area as 'Very important'

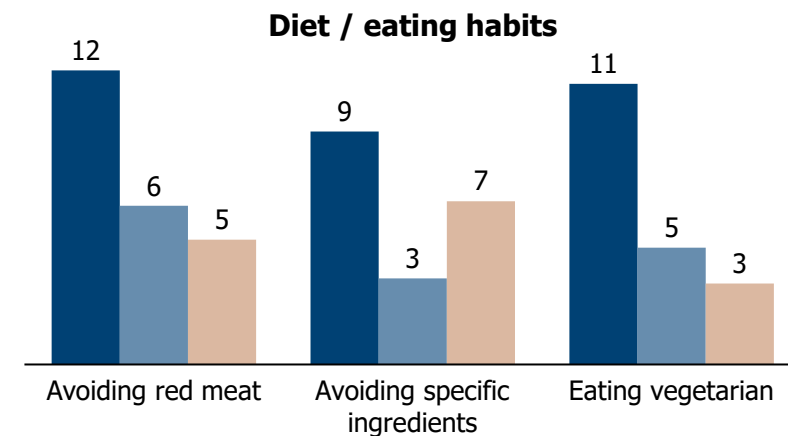
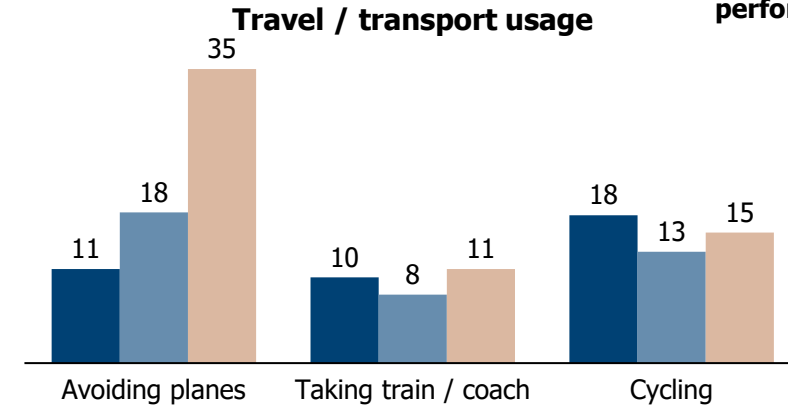
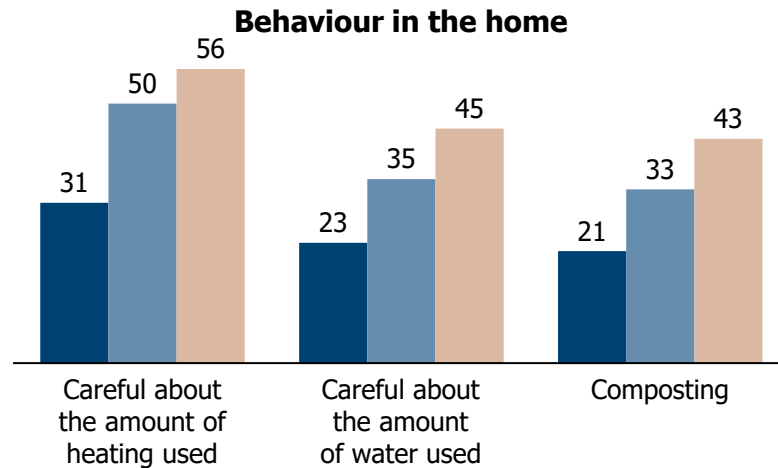


Note: 1) Excludes those who answered 'I don't know / doesn't apply'
Source: EM Consumer Research Survey October 2022 (n = from 2,513 to 2,656) SQ11: How important do you think your personal behaviour in each of the following areas is in terms of its impact on the environment / sustainability?

Older respondents are more likely to be taking 'sustainable' actions in the home and when travelling; the opposite is true for changes to their diet

UPTAKE OF SELECT SUSTAINABILITY ACTIONS BY RESPONDENT AGE GROUP

■ 18-34 ■ 35-54 ■ 55+
Y axis = % 'always' performing action

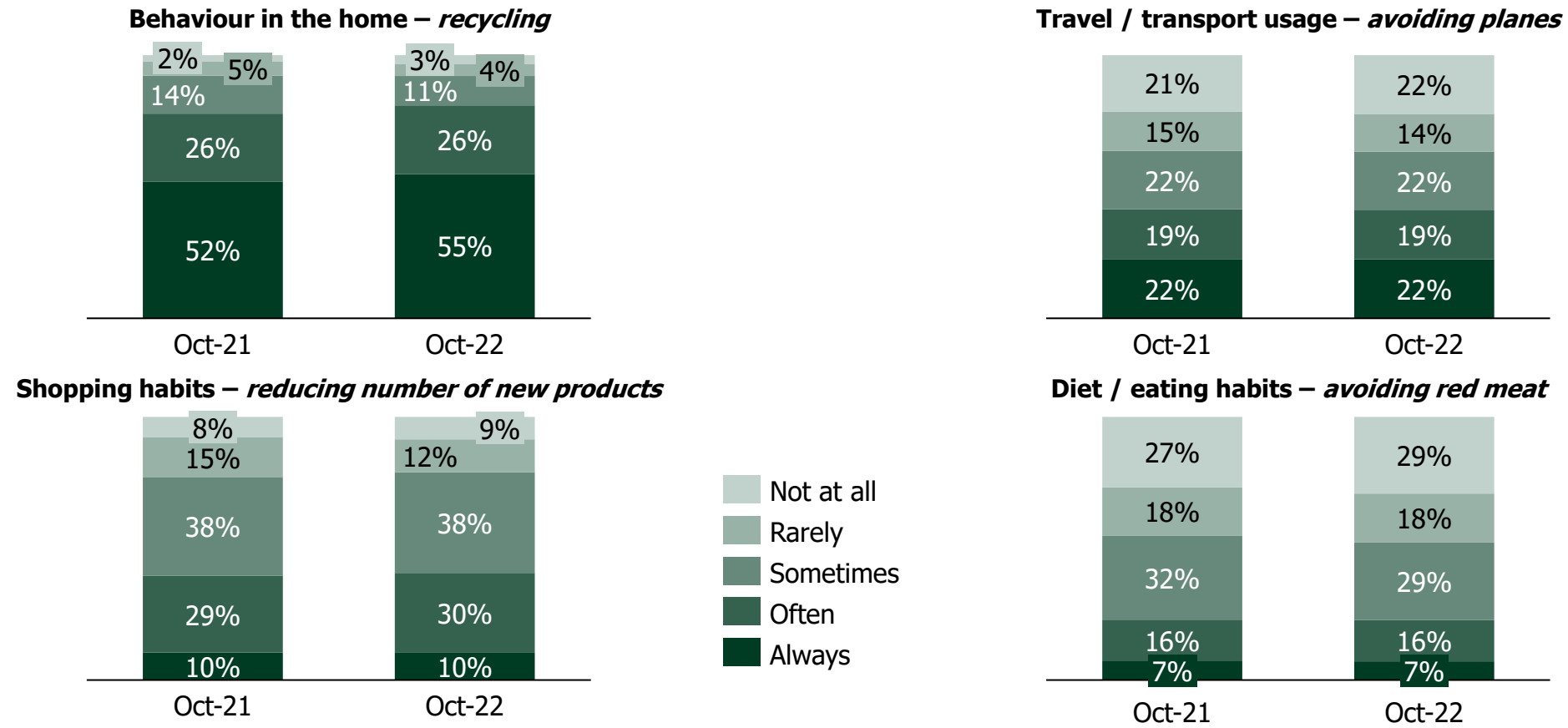


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,061 to 2,693) SQ12, SQ14-16: To what extent are you doing each of the following at home / for transport / travel, when shopping for your eating habits / diet?

Uptake of most sustainable behaviours tested has not changed significantly since we asked the same questions last year...

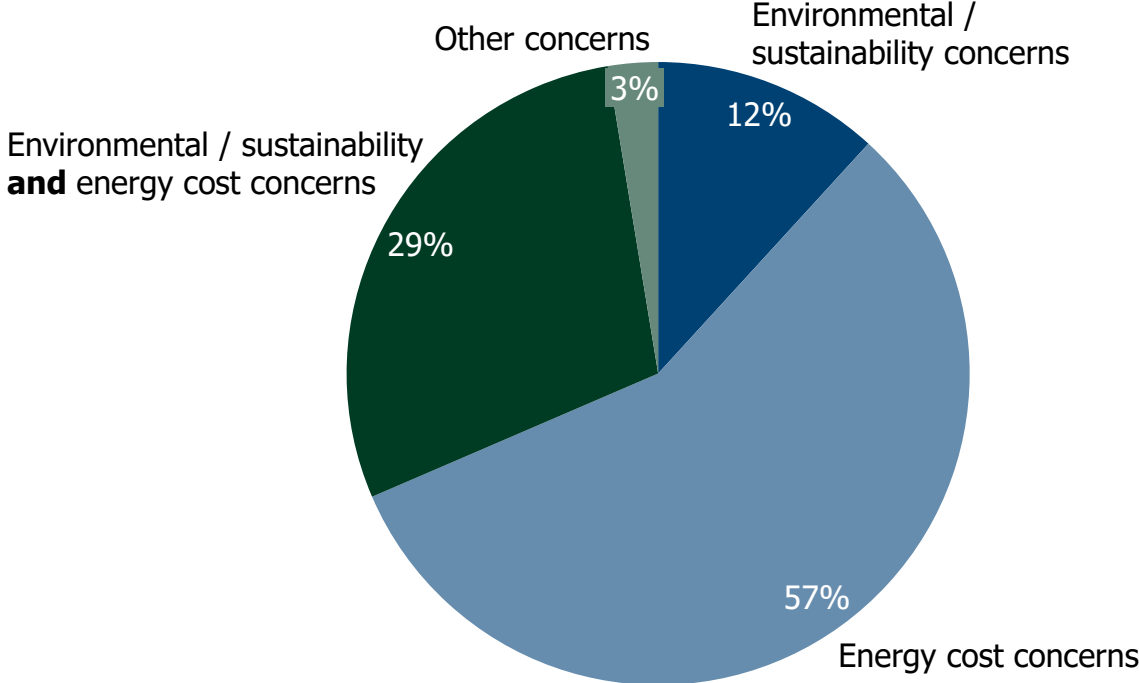
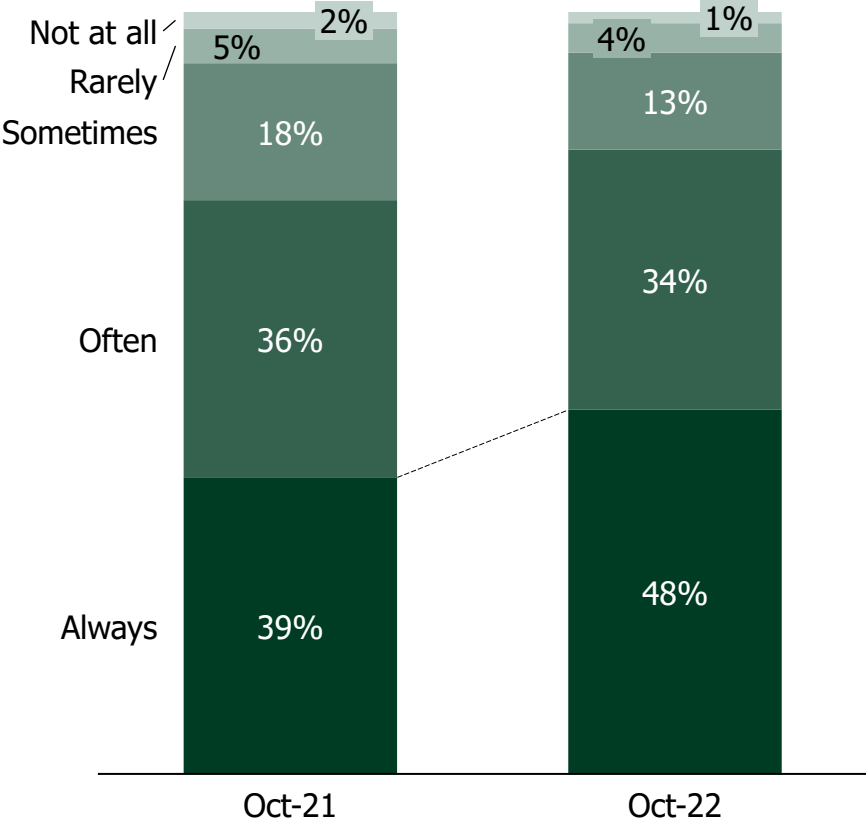
UPTAKE OF SELECT SUSTAINABILITY ACTIONS 2021 VS. 2022



Note: 1) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer Research Survey October 2022 (n = from 829 to 2,706) SQ12,14-16: To what extent are you doing each of the following?

...except for being careful about using heating in the home, although energy cost concerns were cited as the main driver for this

BEING CAREFUL ABOUT USING HEATING 2021 VS. 2022 AND REASONS WHY 2022

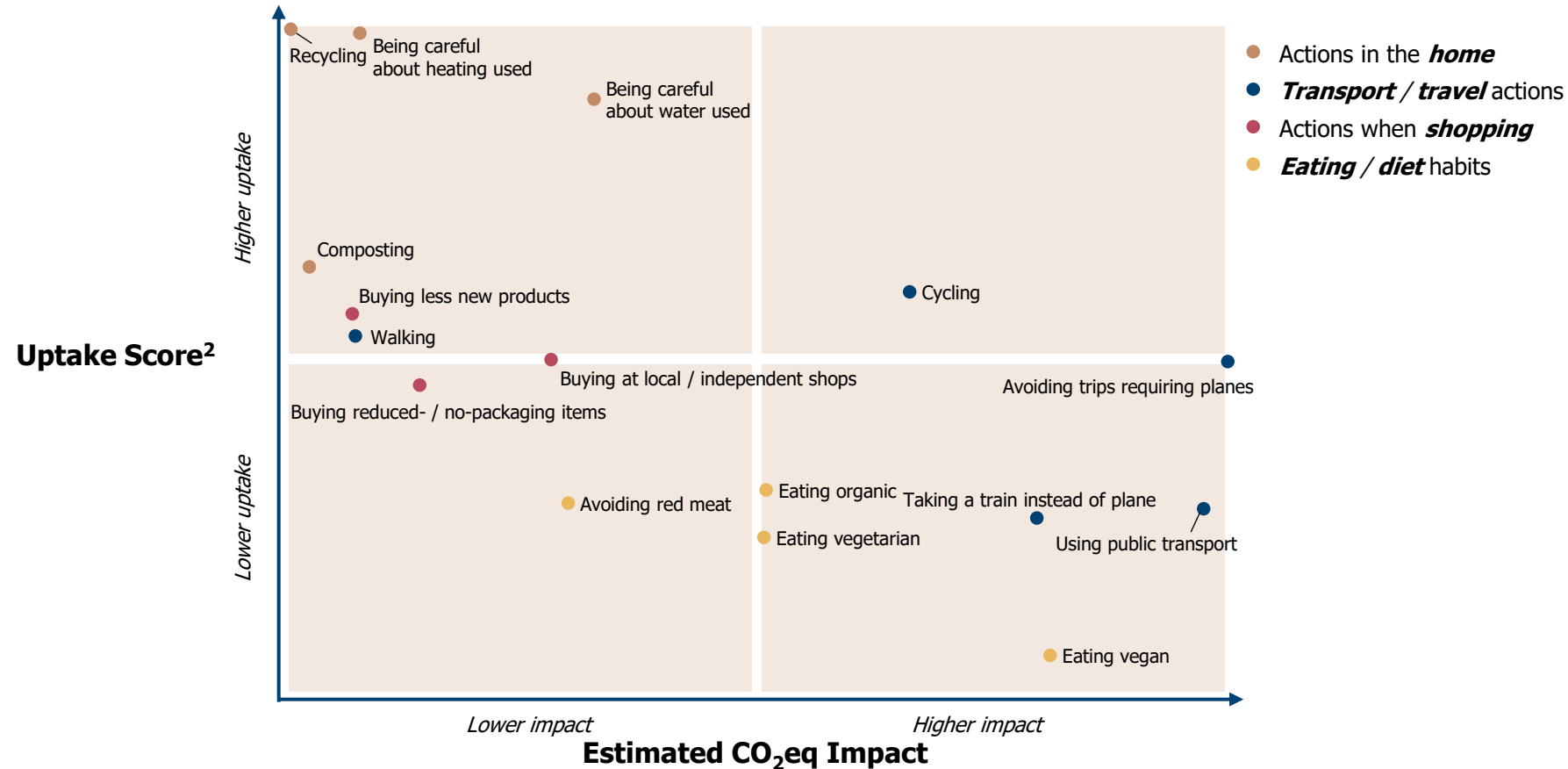


Note: 1) Excludes those who answered 'I don't know / doesn't apply'
 Source: EM Consumer Research Survey October 2022 (n = from 1,012 to 2,716 and 2,510) SQ20: You mentioned that you are trying to be careful about the amount of heating used in your home. What is the primary reason for you trying to be careful about the amount of heating used?

Except for cycling, the climate change mitigation actions with the highest impact have the lowest levels of uptake

UPTAKE OF SUSTAINABILITY ACTIONS VS. CO₂EQ IMPACT

INDICATIVE

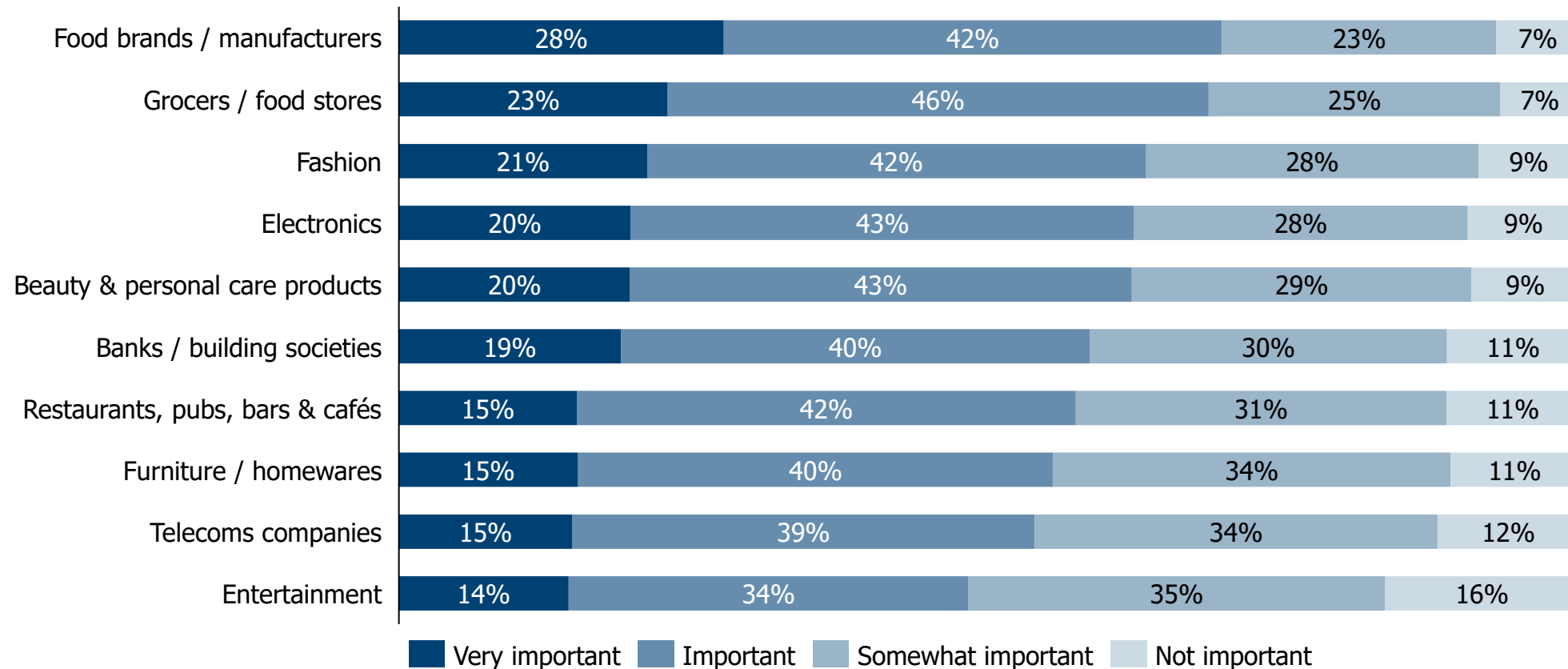


Note: 1) Excludes those who answered 'I don't know / doesn't apply' 2) Uptake calculated by assigning 4-0 to the possible responses, and calculating the SUMPRODUCT for each

Source: EM Consumer Research Survey October 2022 (n = from 2,061 to 2,693) SQ12, SQ14-16: To what extent are you doing each of the following at home / for transport / travel, when shopping, for your eating habits / diet
EU data from: Quantifying the potential for climate change mitigation of consumption options - Diana Ivanova et al 2020 Environ. Res. Lett. 15

Respondents find it most important for food and grocery companies to show a strong commitment to sustainability

IMPORTANCE OF A BUSINESS / BRAND SHOWING STRONG SUSTAINABILITY COMMITMENT

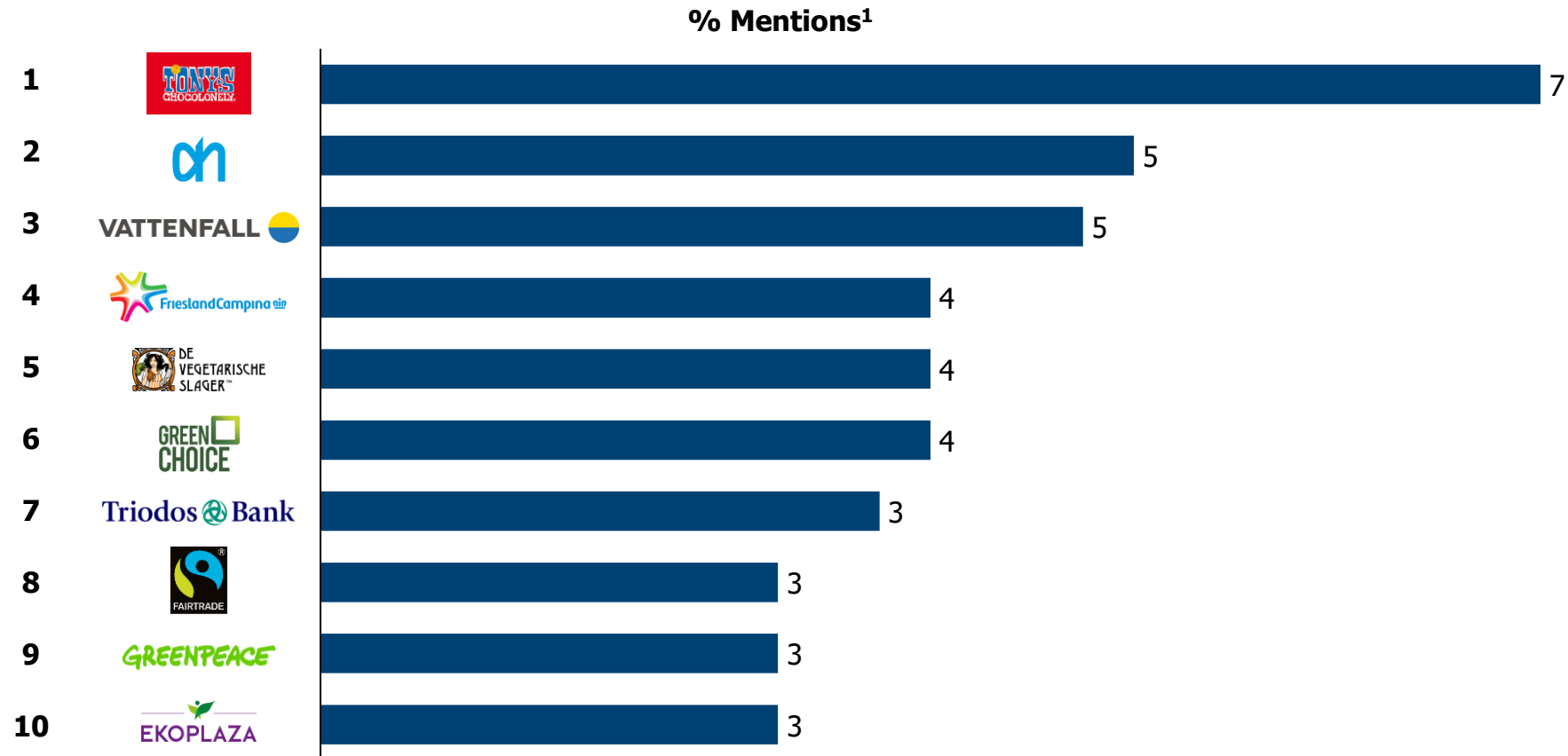


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,387 to 2,595) SQ18: How important is it to you that the following types of brands / businesses show a strong commitment to sustainability / the environment?

Food and utility businesses make up most of the 'Top 10' brands / businesses respondents think are doing a 'good job' on sustainability

BRANDS / BUSINESSES DOING A 'GOOD JOB' ON SUSTAINABILITY / ENVIRONMENT



1) Out of the total number of people who answered with at least one brand entry

Source: EM Consumer Research Survey October 2022 (n = 326) SQ17r1: Which brands / businesses do you think are doing a good job when it comes to sustainability / the environment?