

# Eden McCallum UK Consumer Survey

Environmental Sustainability –  
Consumer perspectives

November 2022



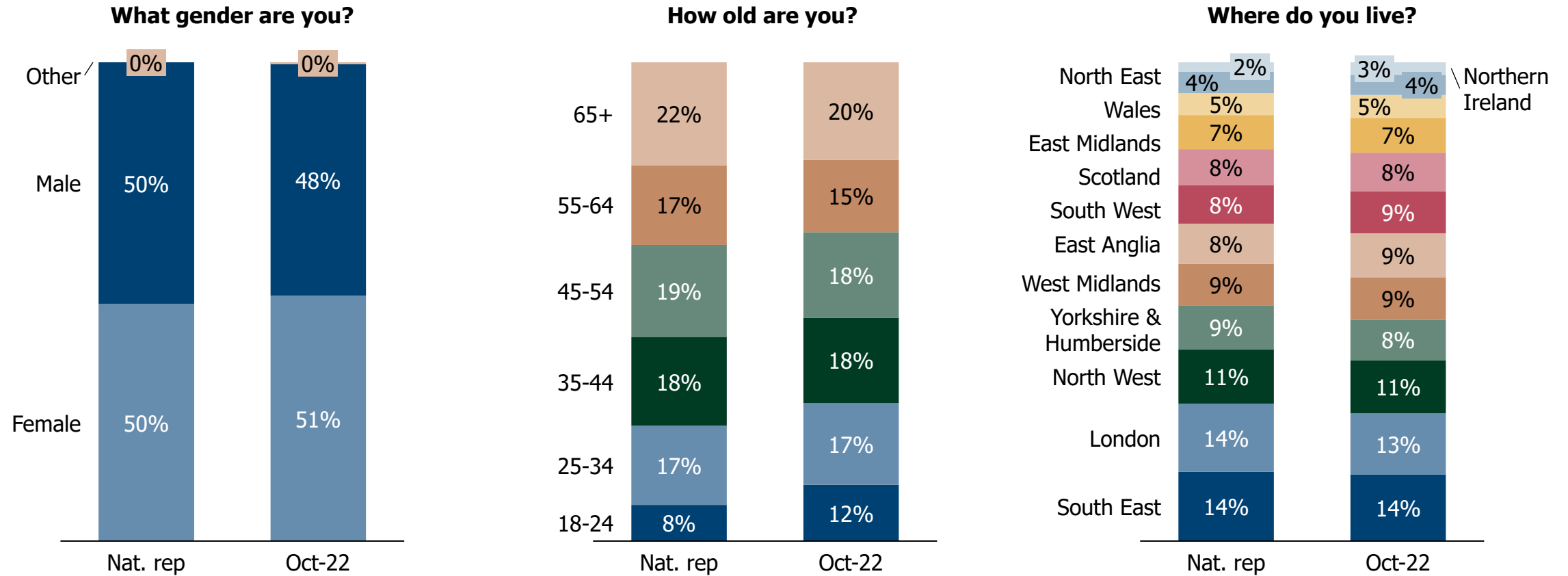
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# The survey respondents are a nationally representative sample in terms of gender, age, and regional distribution

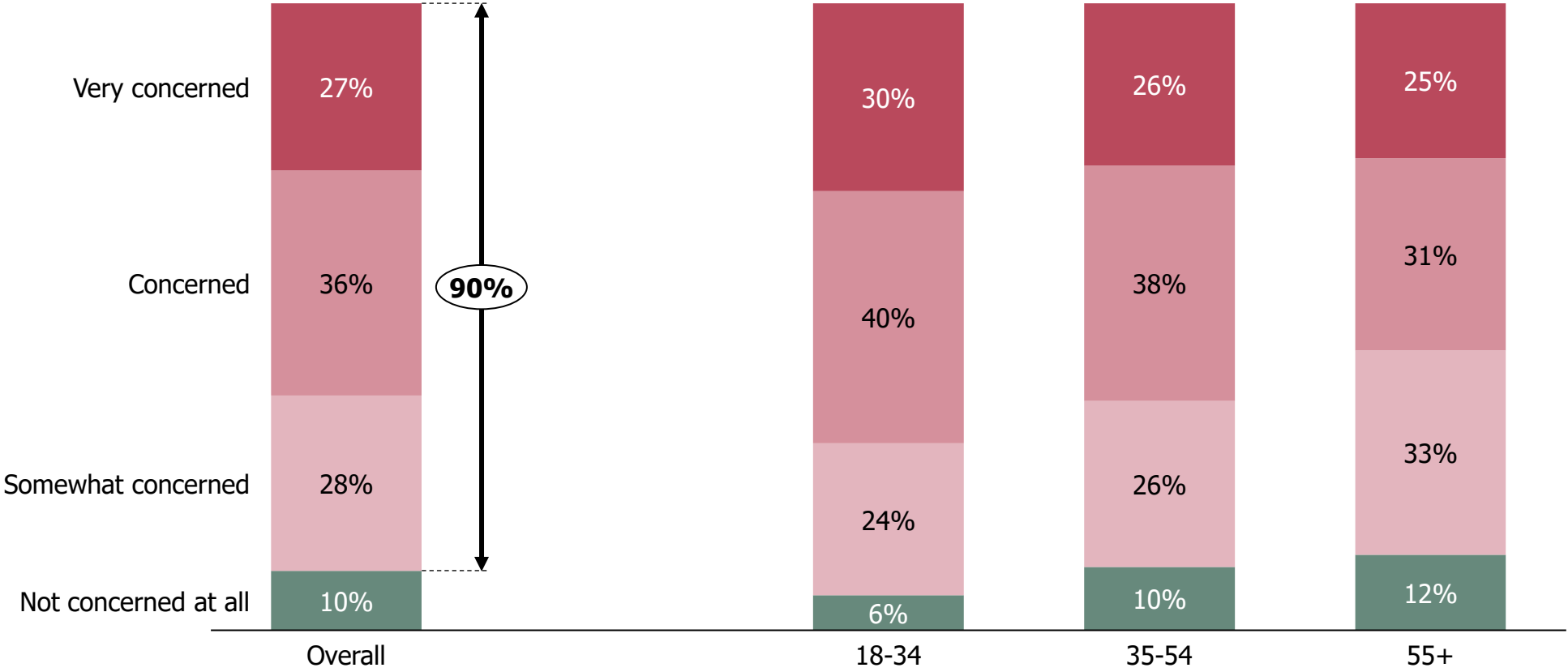
## KEY FACTS ABOUT THE UK SAMPLE



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 = from 3,076 to 3,103) 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

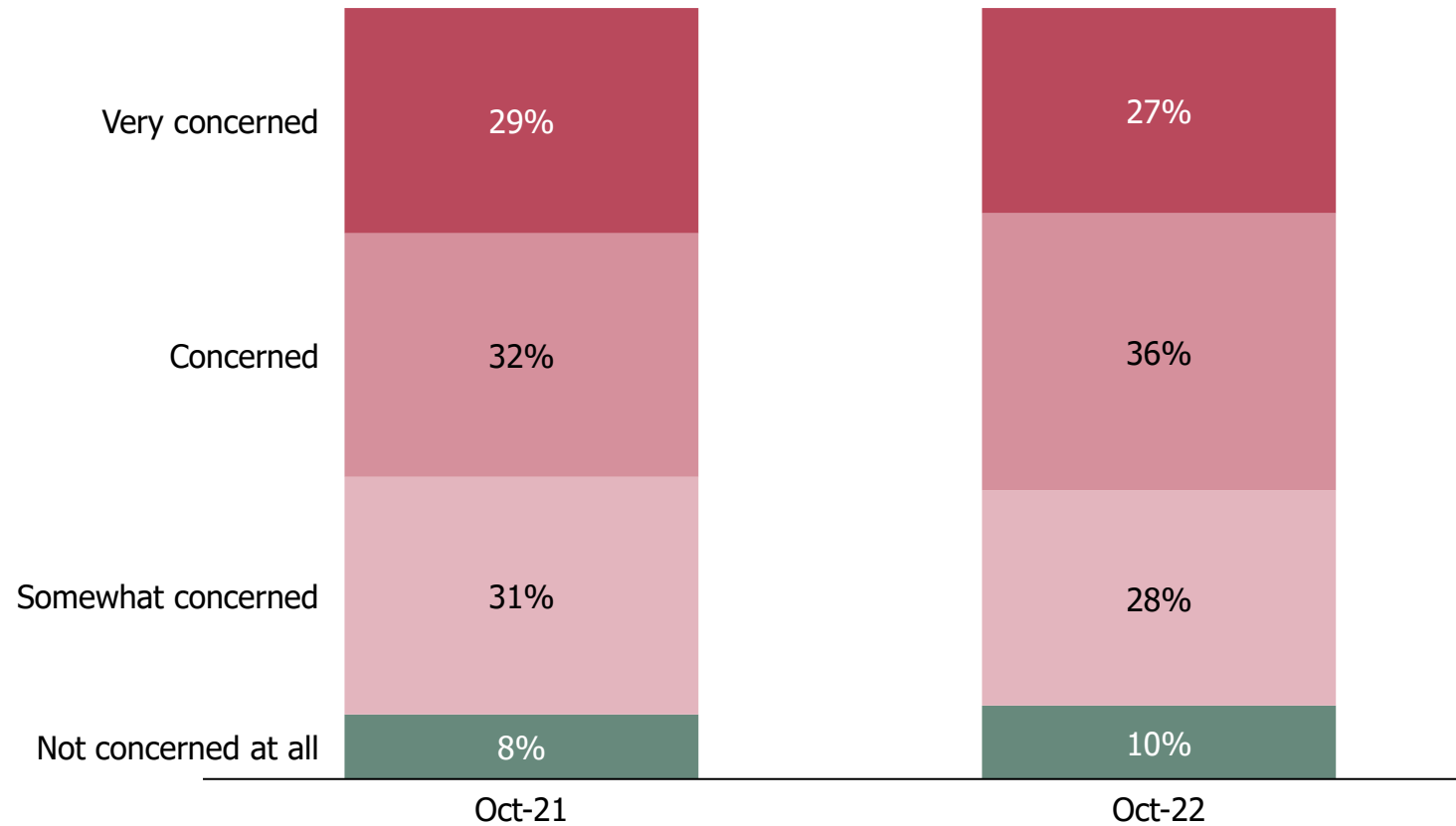
LEVEL OF CONCERN ABOUT ENVIRONMENT / SUSTAINABILITY



Note: 1) Excludes those who answered 'I don't know / doesn't apply'  
Source: EM Consumer Research Survey October 2022 (n = 3,072) 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

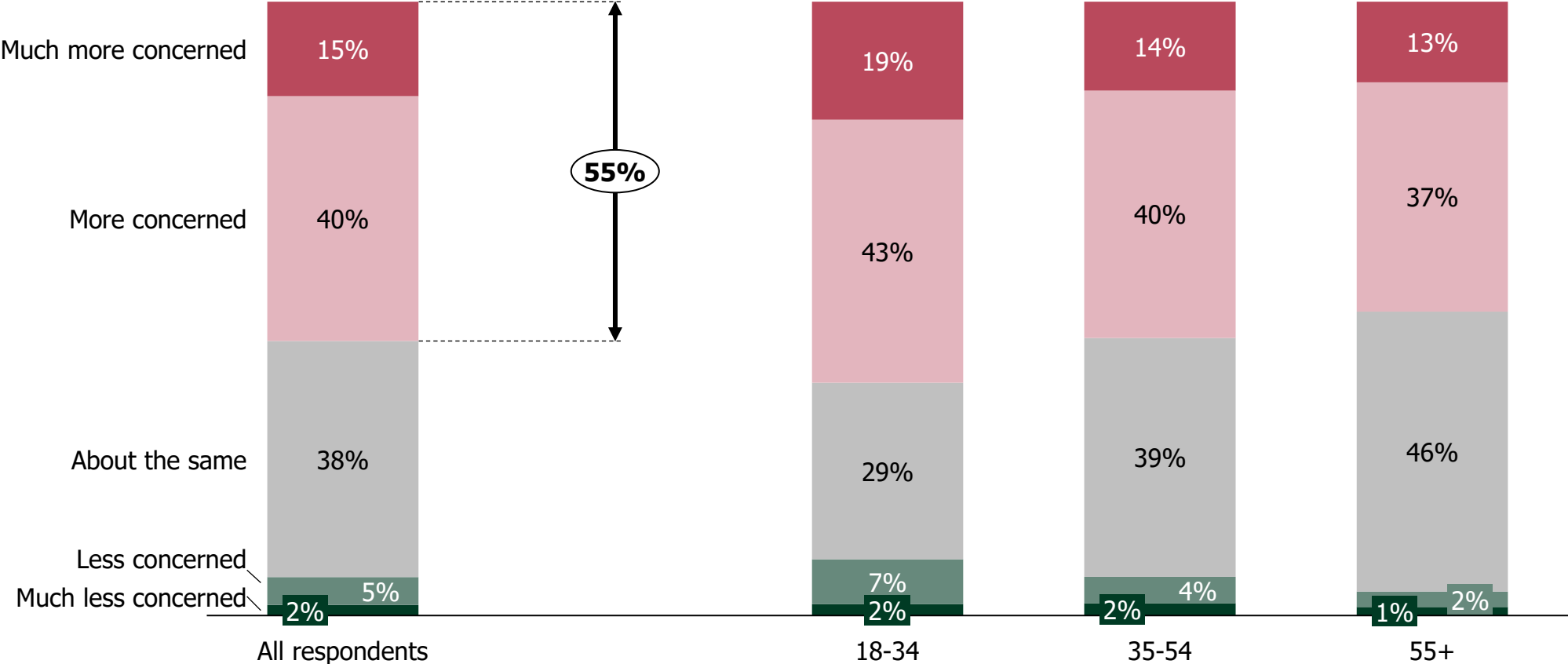


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = 1,006 to 3,072) SQ9: How concerned are you about the environment / sustainability?

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

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



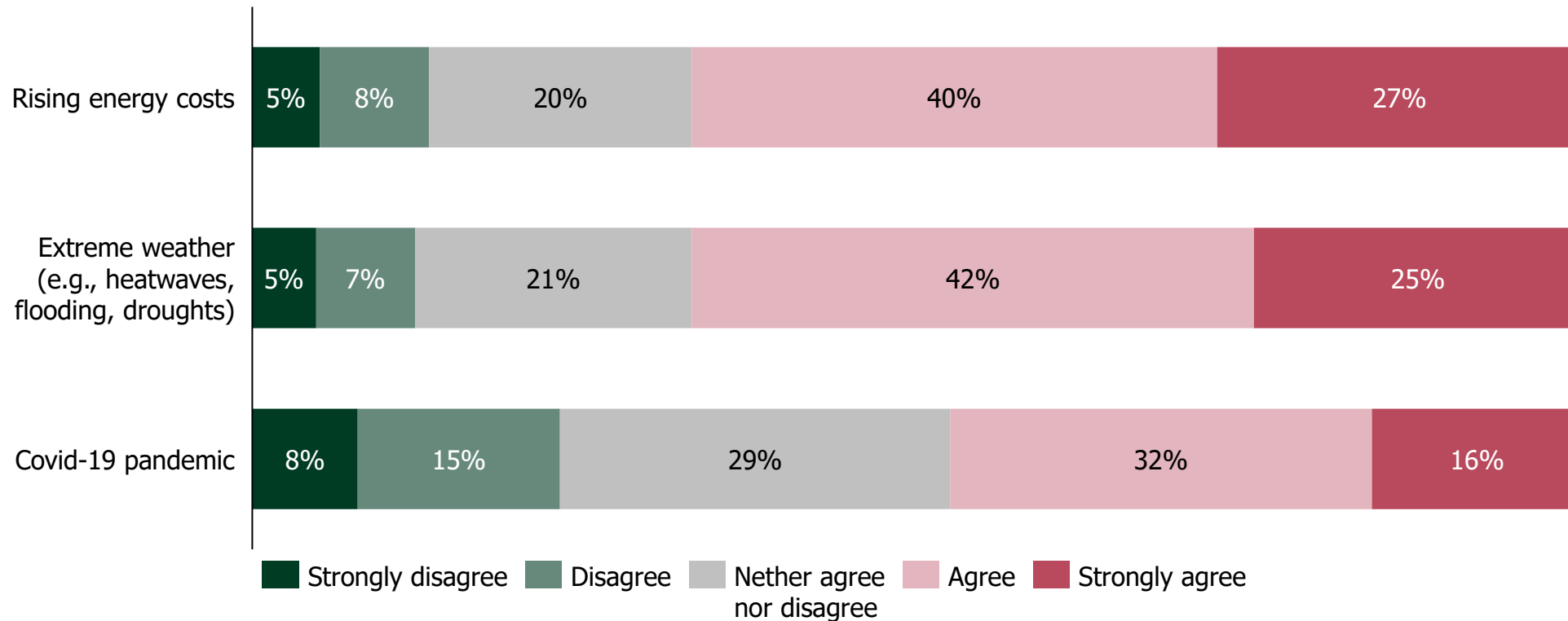
Note: 1) Excludes those who answered 'I don't know / doesn't apply'  
 Source: EM Consumer Research Survey October 2022 (n = 1,006 to 3,072) SQ19: Thinking about your level of concern about the environment / sustainability, how does this compare to how you felt 1-2 years ago?

# 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"

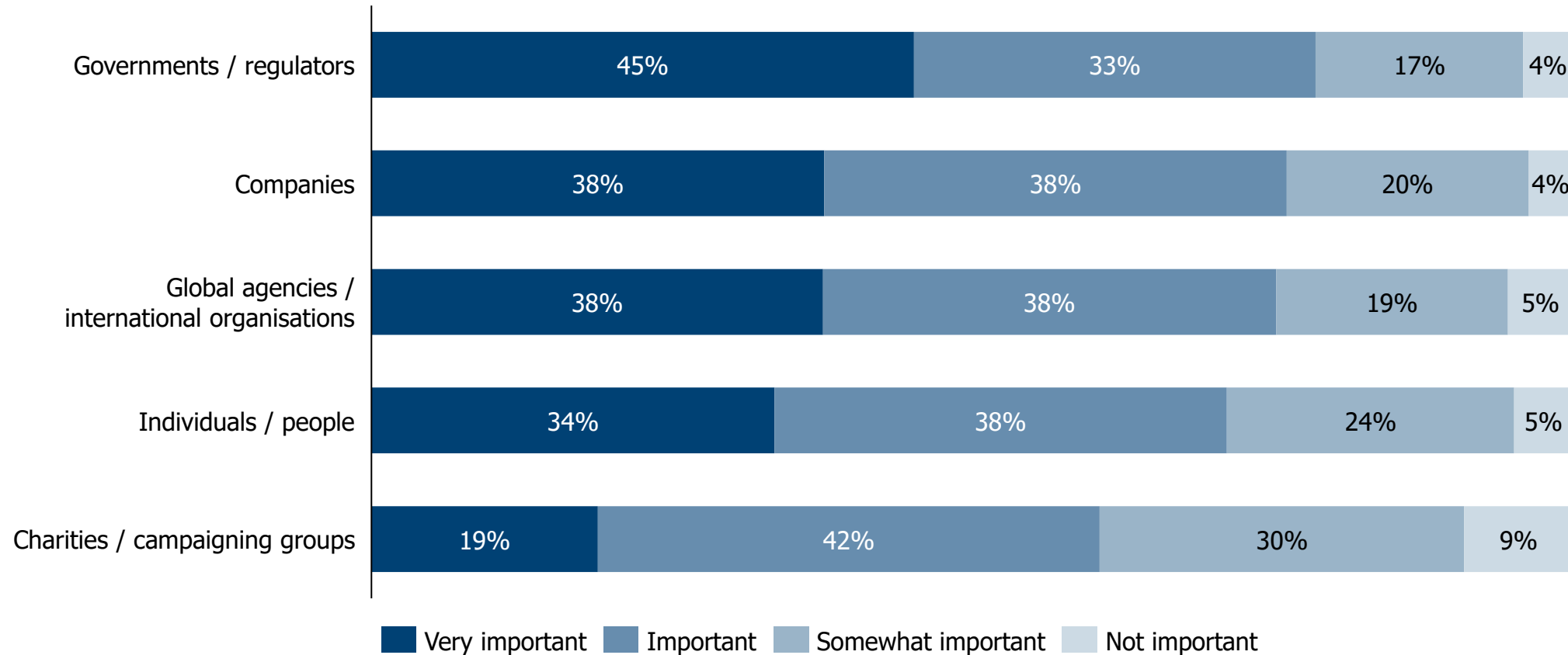


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 3,081 to 3,083) SQ21: To what extent do you agree or disagree with the following statements?

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

## IMPACT OF DIFFERENT GROUPS ON ENVIRONMENT / SUSTAINABILITY



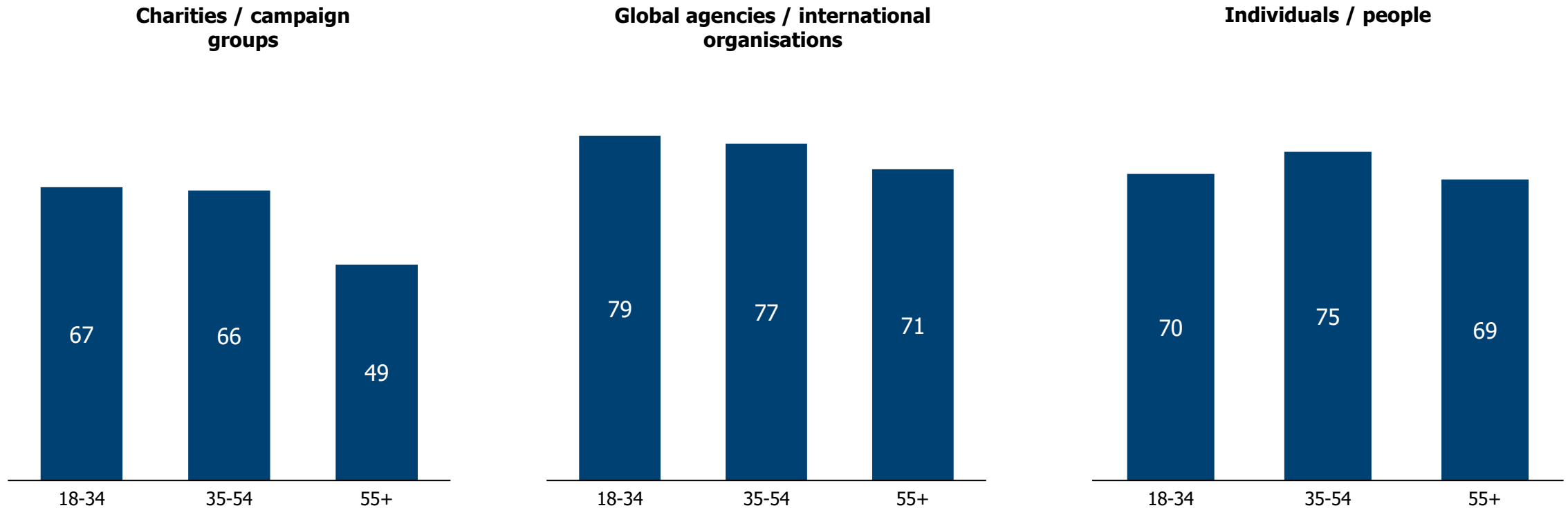
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,973 to 3,028) 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 more likely to put faith in the influence of charities / campaign groups and global agencies

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

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



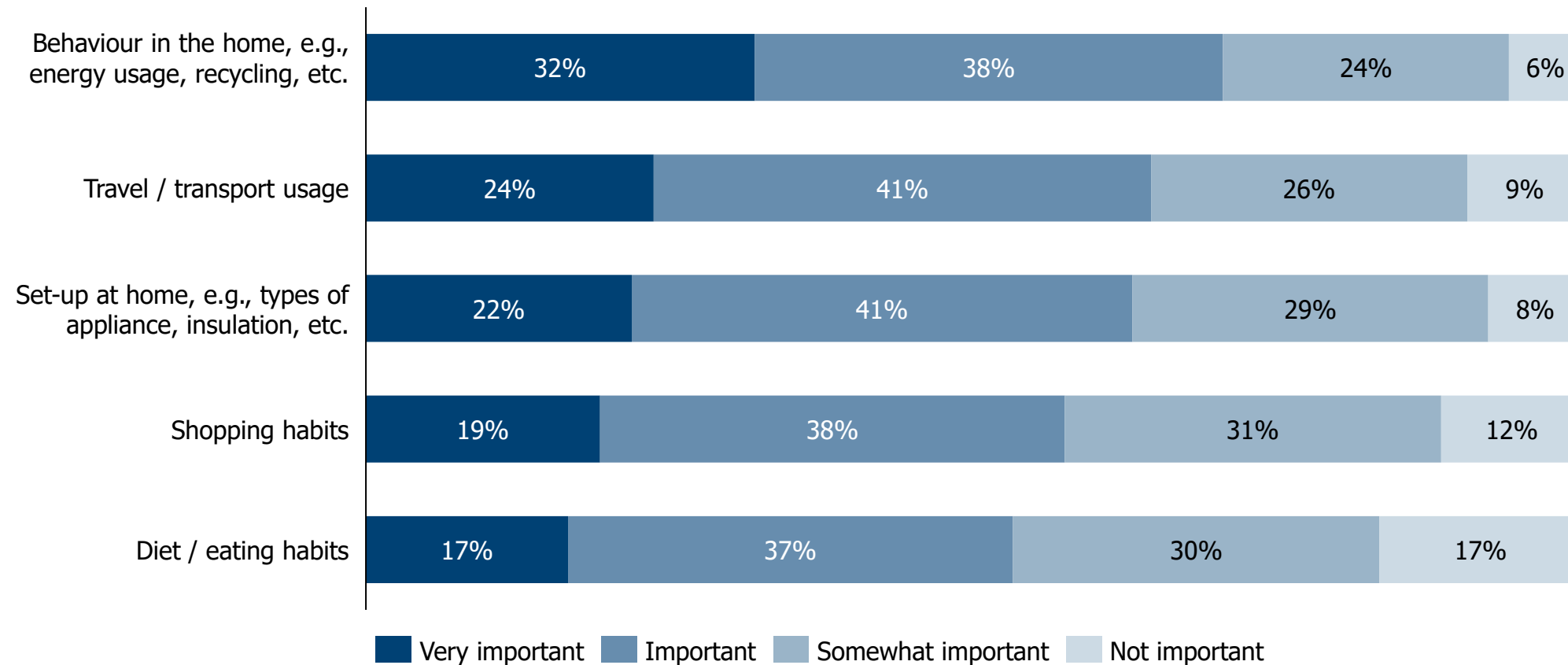
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,945 to 3,001) 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

## PERCIEVED IMPACT OF PERSONAL BEHAVIOURS ON ENVIRONMENT / SUSTAINABILITY

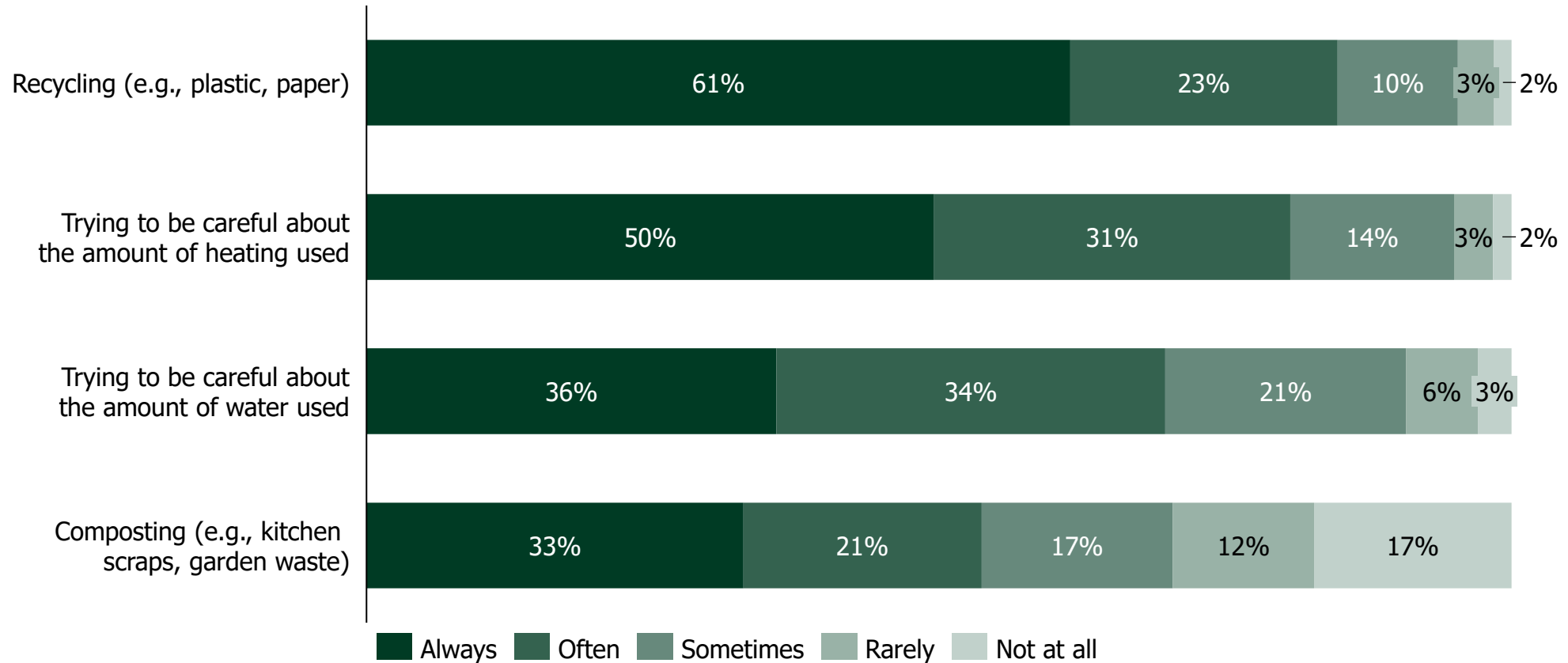


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 3,009 to 3,068) 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

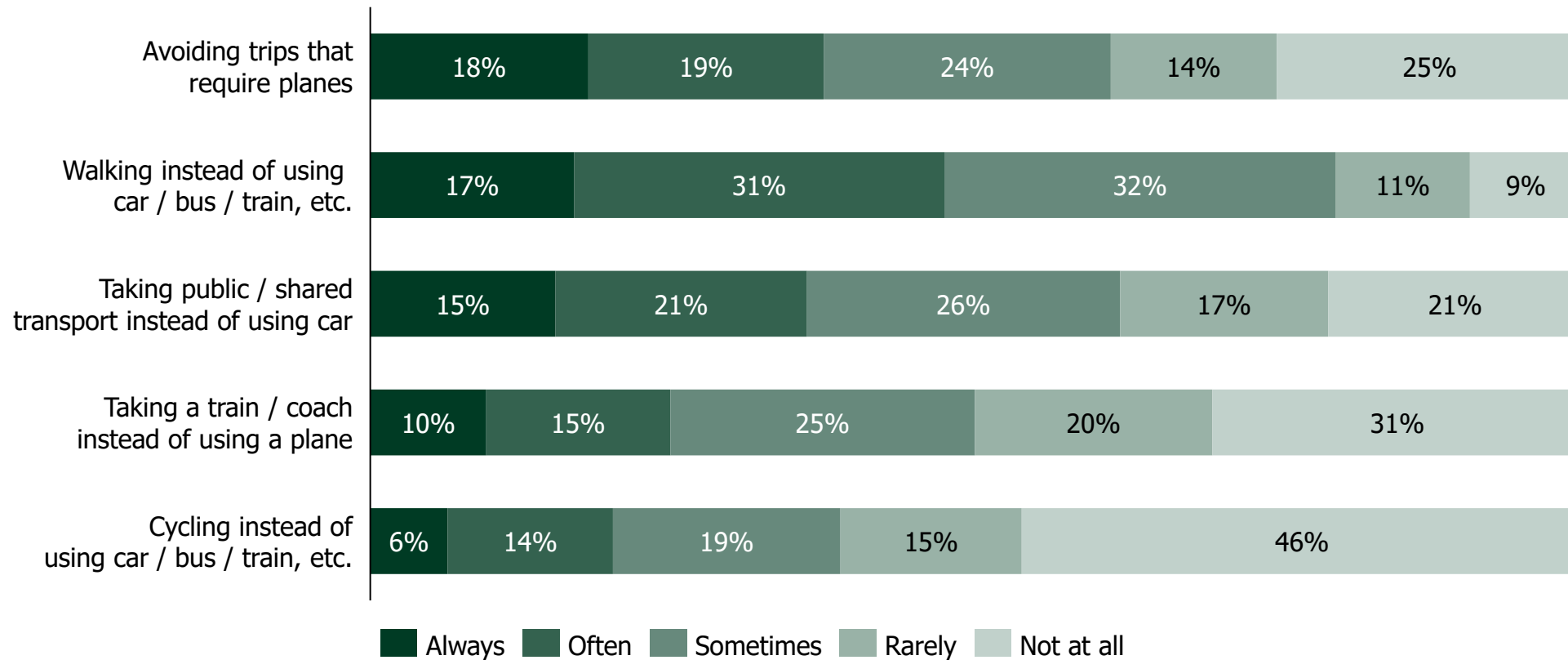


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,917 to 3,088) SQ12: To what extent are you doing each of the following at home?

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

## UPTAKE OF PERSONAL BEHAVIOURS FOR TRAVEL

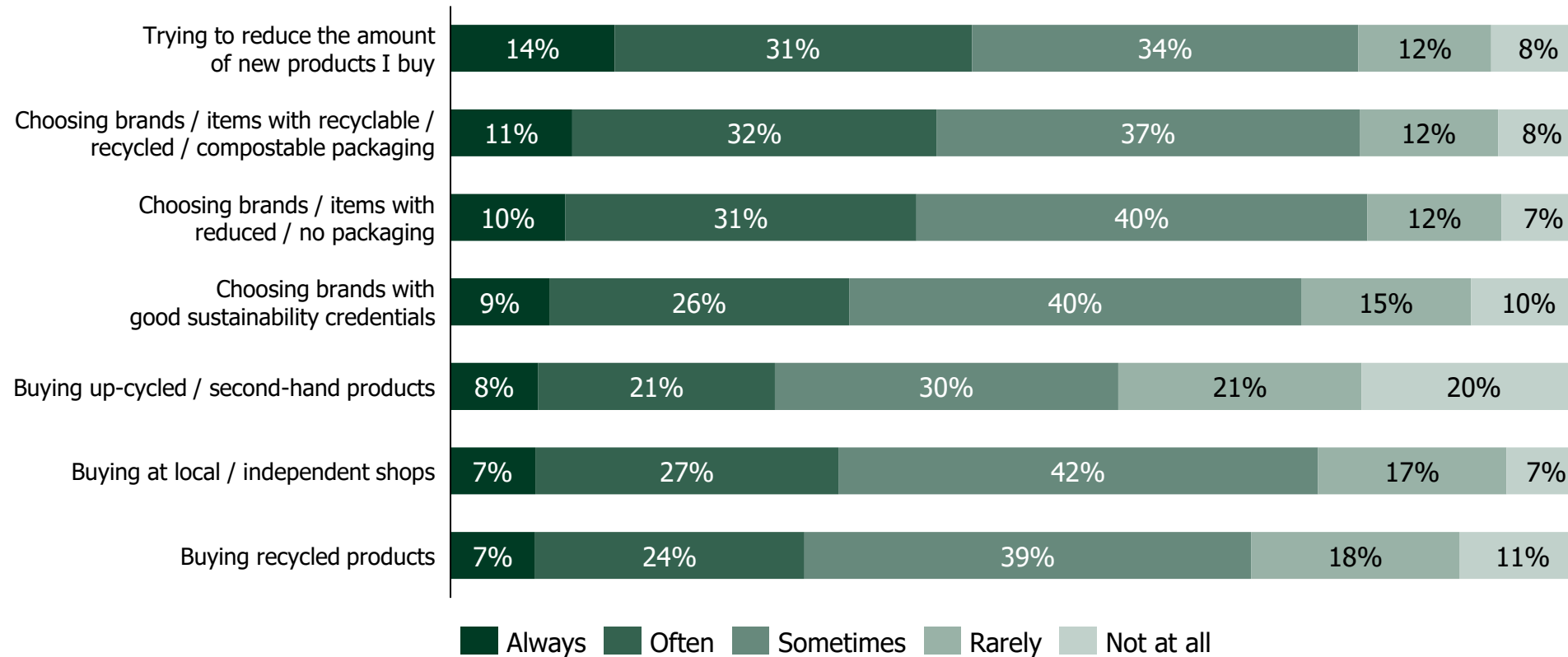


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,407 to 3,029) SQ14: To what extent are you doing each of the following for your transport / travel?

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

## UPTAKE OF PERSONAL BEHAVIOURS WHEN SHOPPING

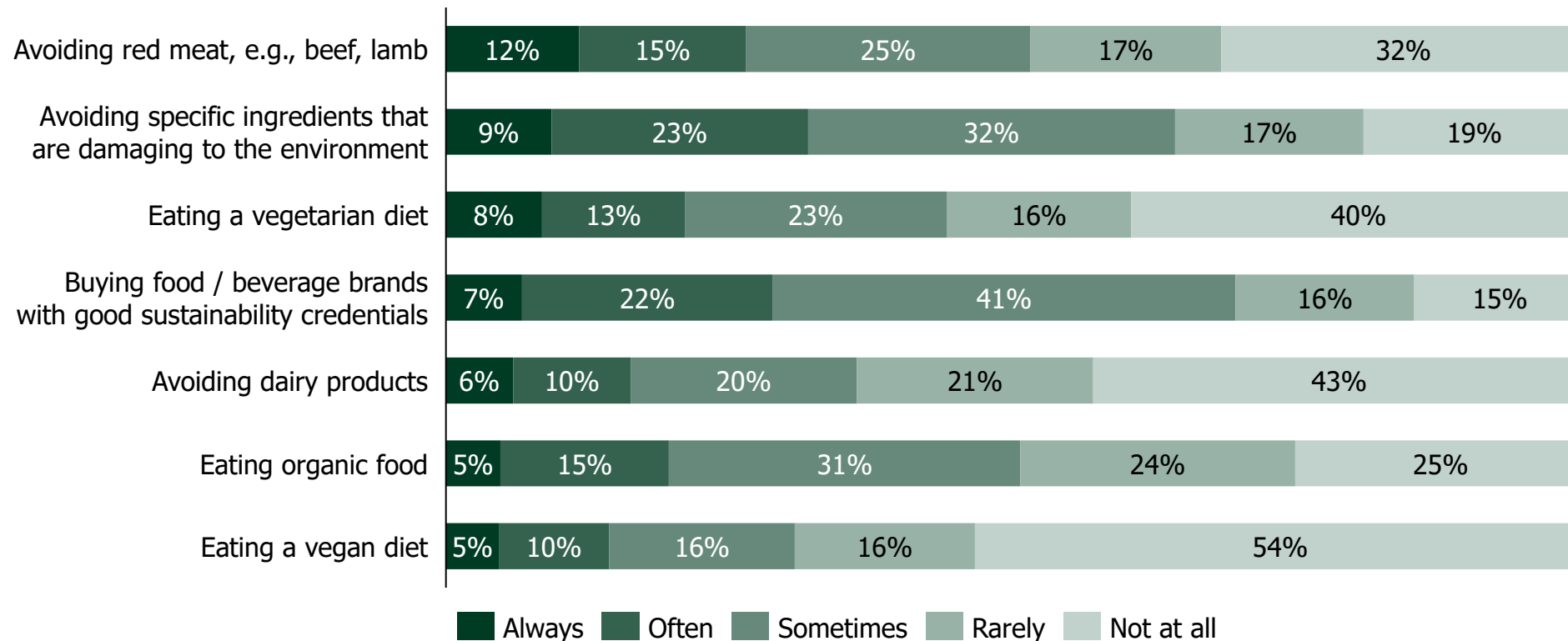


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,942 to 3,062) SQ15: To what extent are you doing each of the following when shopping?

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

## UPTAKE OF PERSONAL BEHAVIOURS WHEN EATING



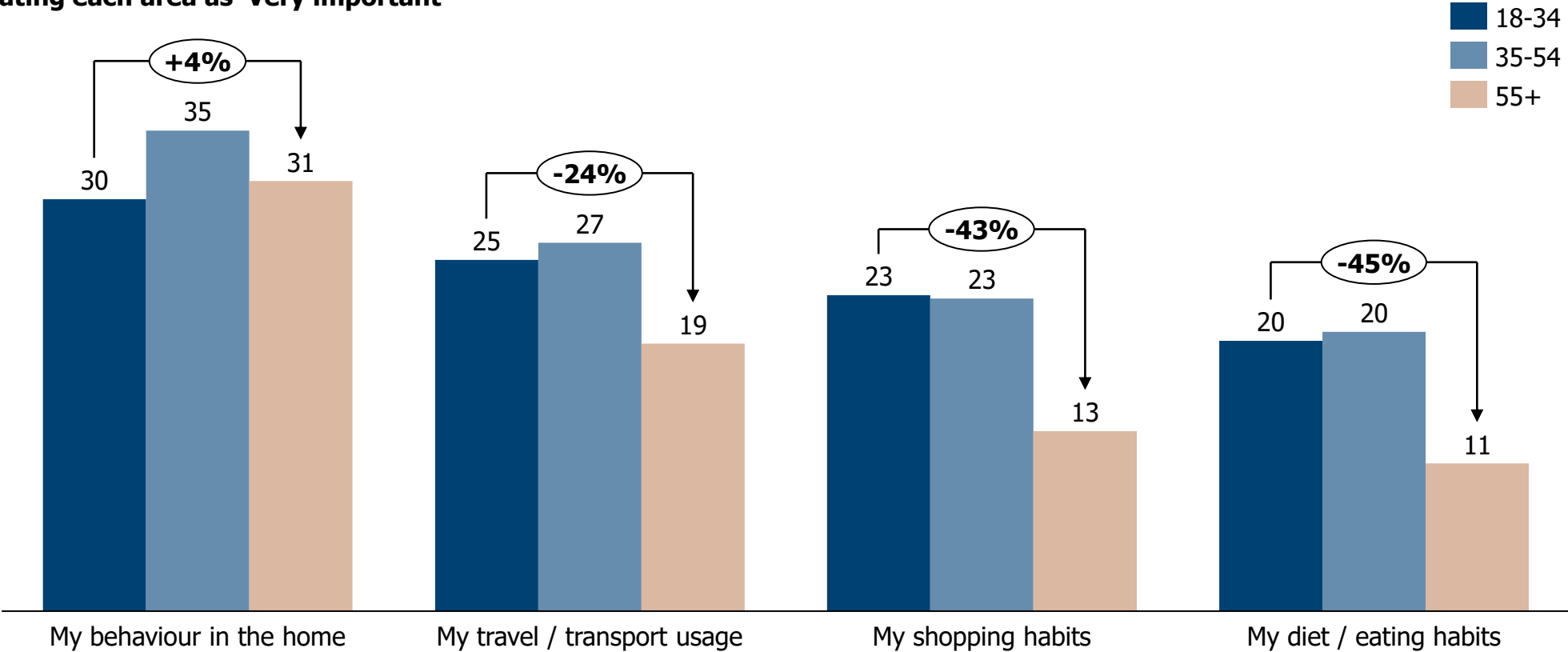
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,939 to 3,062) 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 exception of behaviours in the home

## PERCEIVED IMPORTANCE OF PERSONAL BEHAVIOURS BY AGE GROUP

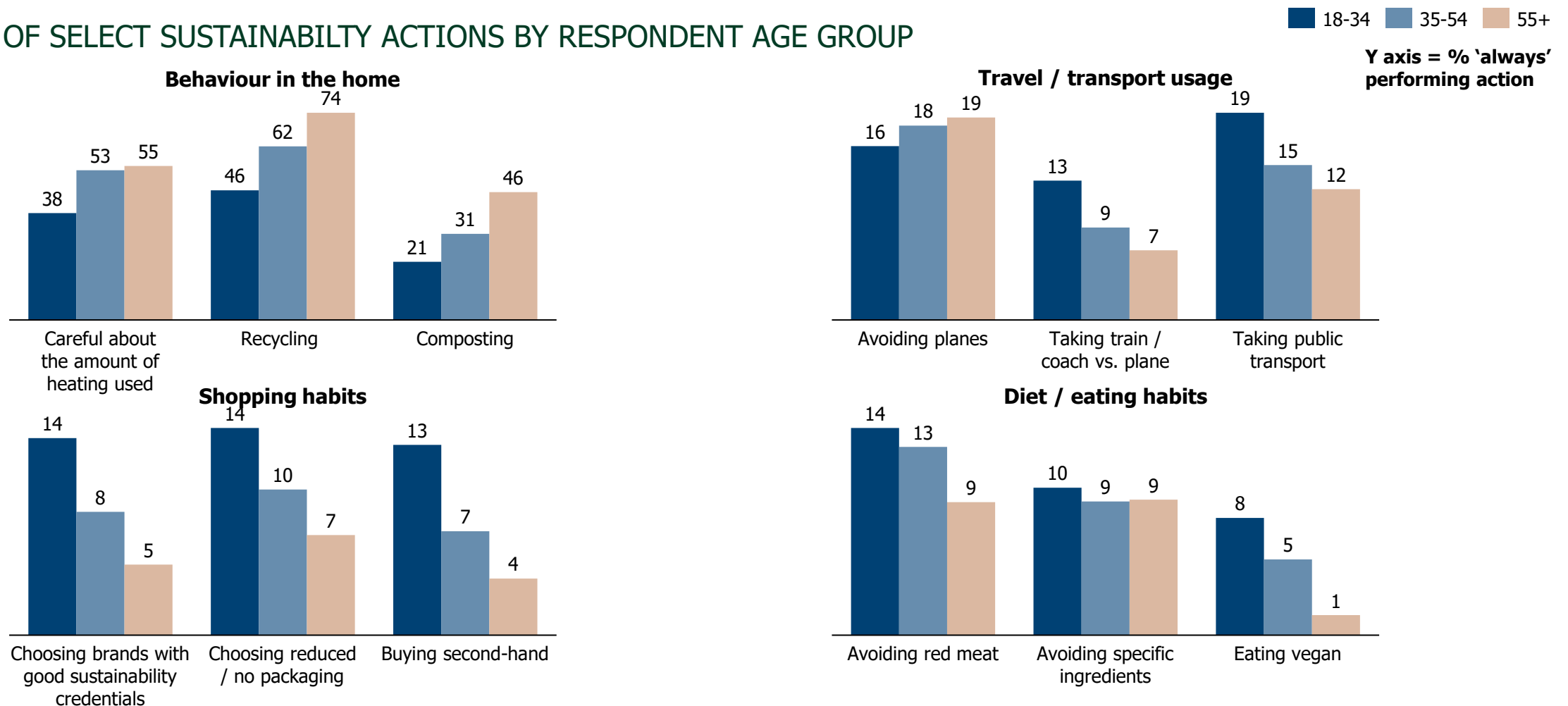
% rating each area as 'Very important'



Note: 1) Excludes those who answered 'I don't know / doesn't apply'  
Source: EM Consumer Research Survey October 2022 (n = from 3,009 to 3,068) 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; the opposite is true for most areas tested in travel, diet, and shopping

## UPTAKE OF SELECT SUSTAINABILITY ACTIONS BY RESPONDENT AGE GROUP

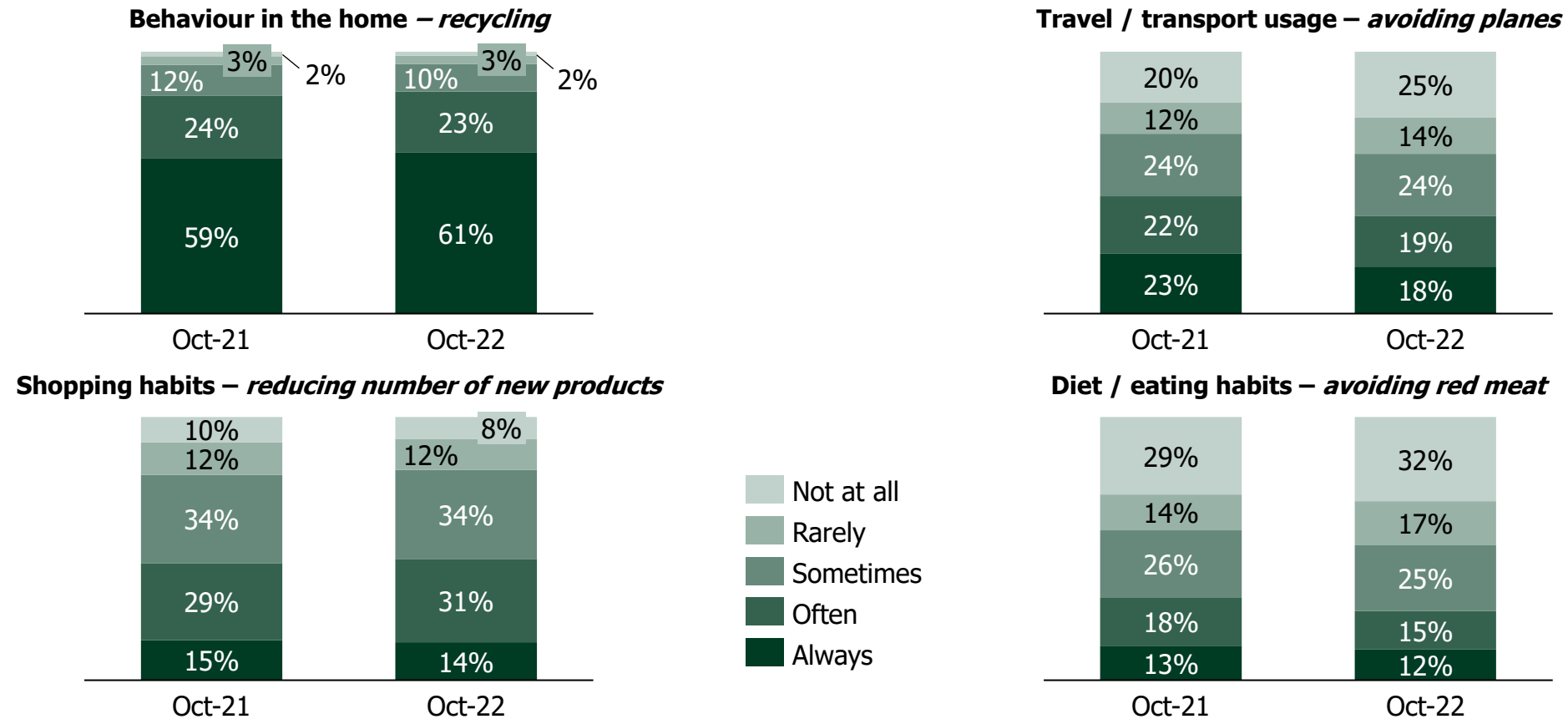


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,409 to 3,061) 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



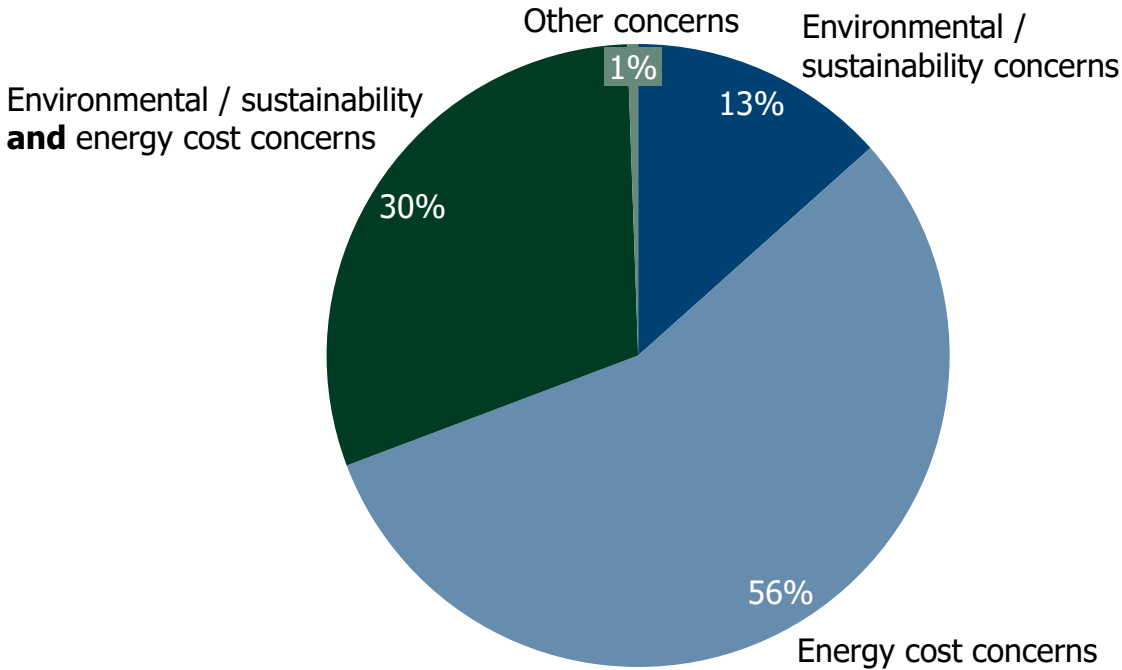
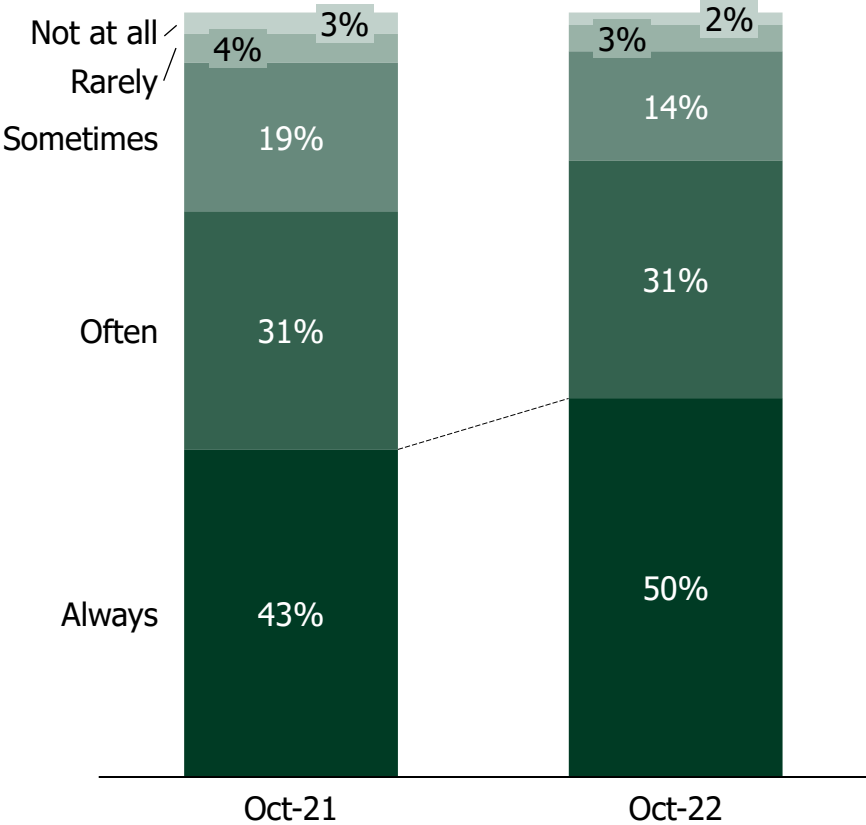
Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 856 to 3,088) 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

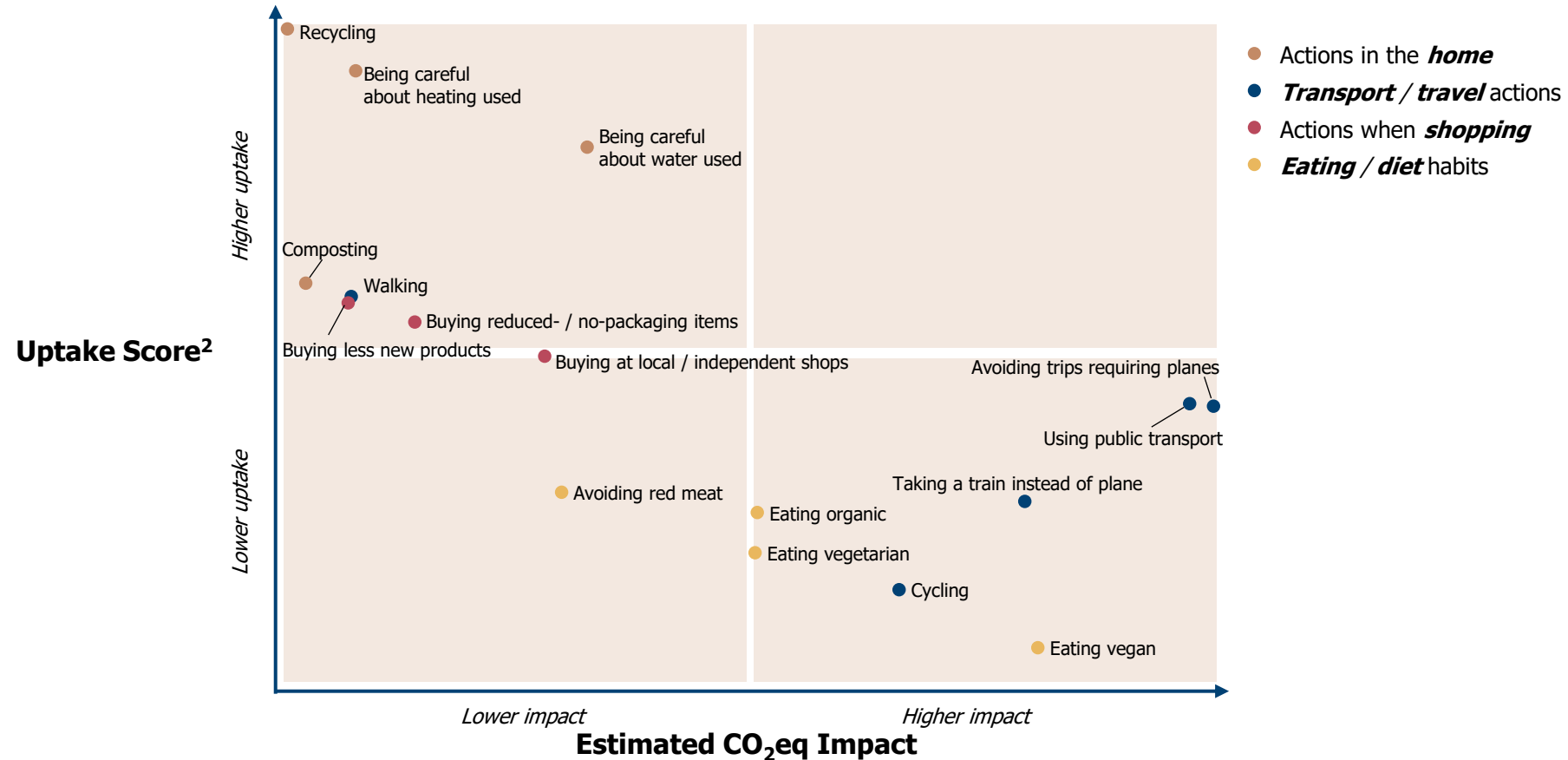


Note: 1) Excludes those who answered 'I don't know / doesn't apply'  
 Source: EM Consumer Research Survey October 2022 (n = from 1,012 to 3,083 and 2,882) SQ20: You mentioned that you are trying to be careful about the amount of heating used in your home. What is the primary reason for you trying to be careful about the amount of heating used?

# Worryingly, the climate change mitigation actions with the highest impact have the lowest levels of uptake

## UPTAKE OF SUSTAINABILITY ACTIONS VS. CO<sub>2</sub>EQ IMPACT

INDICATIVE



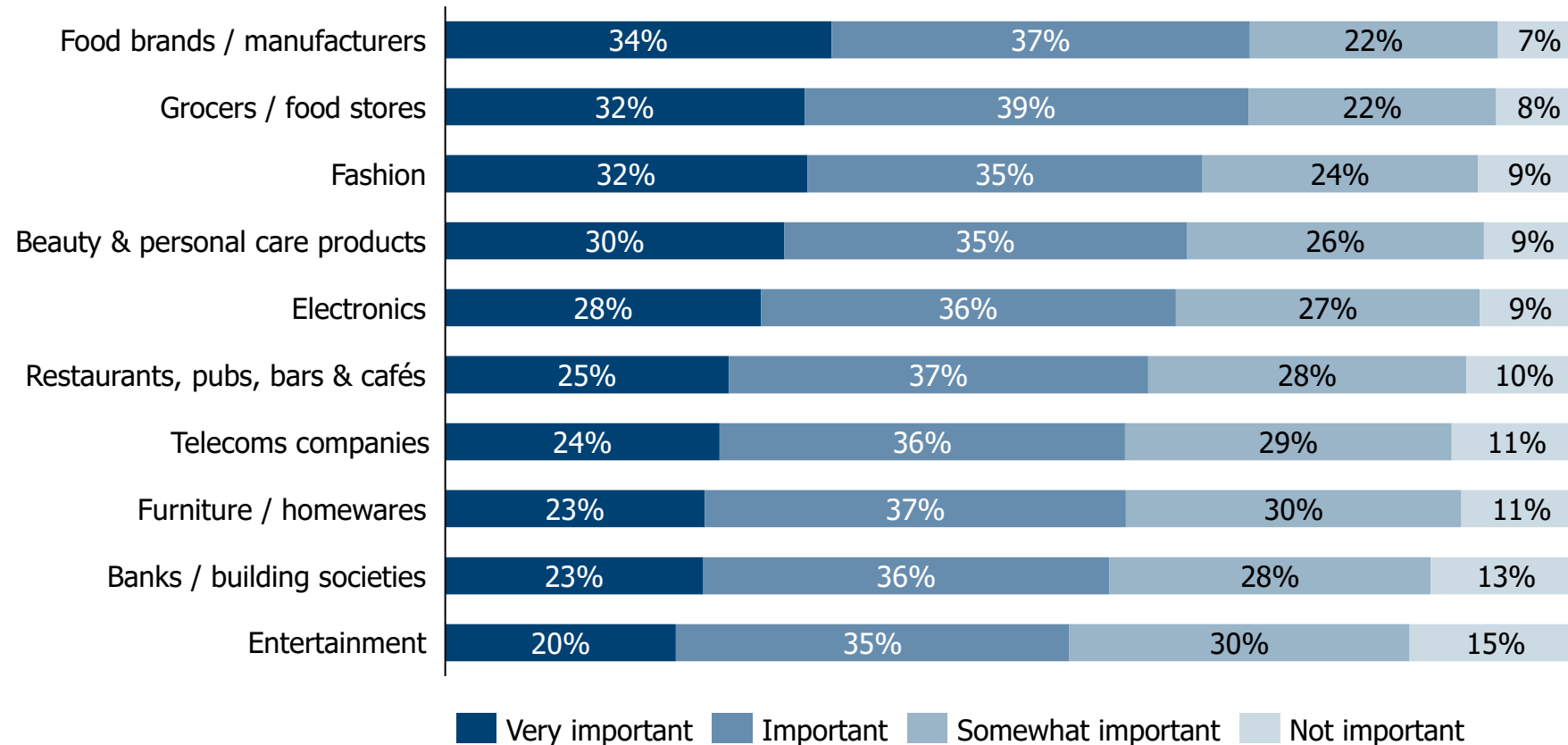
Note: 1) Excludes those who answered 'I don't know / doesn't apply' 2) Uptake calculated by assigning 4-0 to the possible responses, and calculating the SUMPRODUCT for each

Source: EM Consumer Research Survey October 2022 (n = from 2,407 to 3,088) 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

# When it comes to showing a commitment to sustainability / the environment, respondents have strong expectations across product types

## IMPORTANCE OF A BUSINESS / BRAND SHOWING STRONG SUSTAINABILITY COMMITMENT

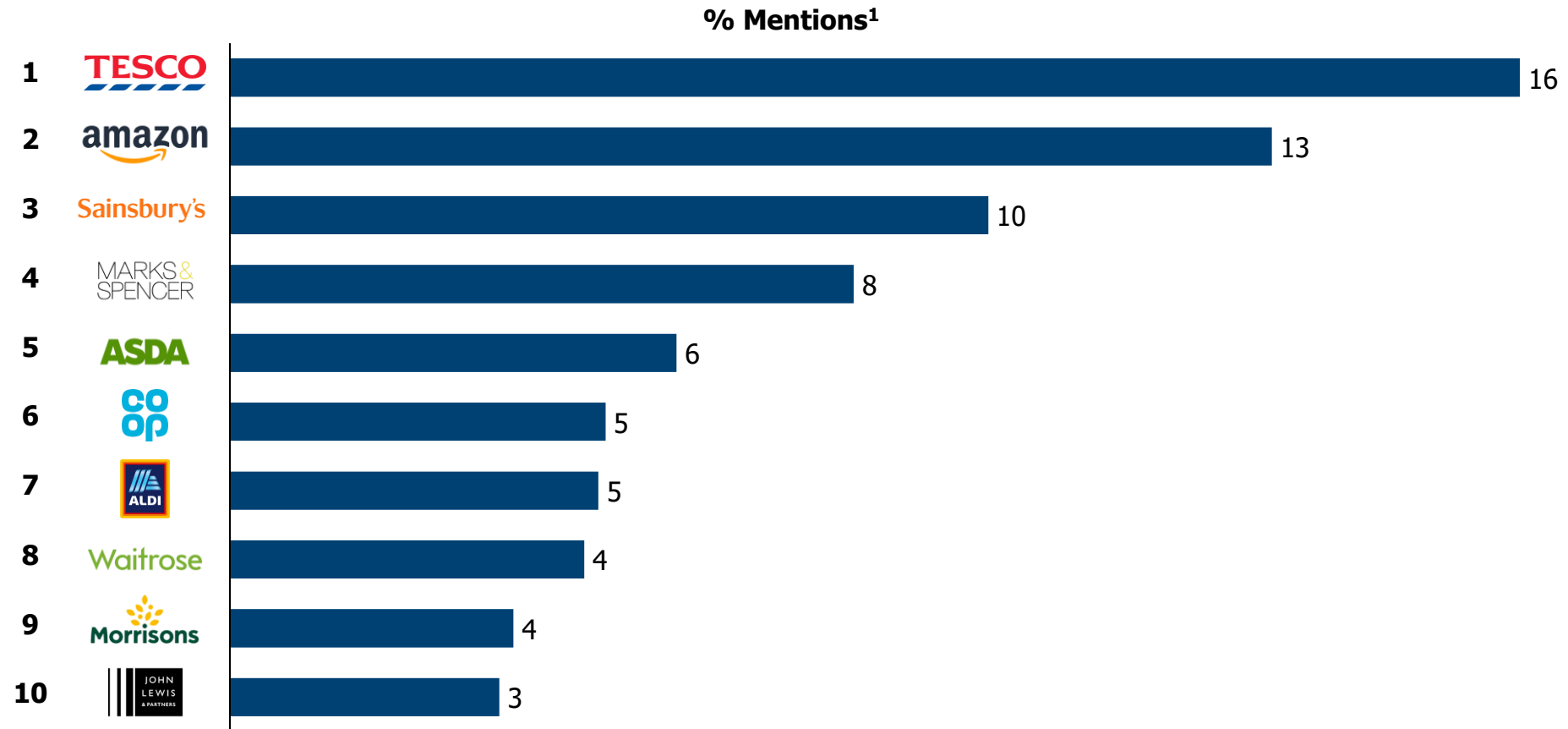


Note: 1) Excludes those who answered 'I don't know / doesn't apply'

Source: EM Consumer Research Survey October 2022 (n = from 2,907 to 3,040) SQ18: How important is it to you that the following types of brands / businesses show a strong commitment to sustainability / the environment?

# Grocers and well-known brands make up the 'Top 10' brands / businesses respondents think are doing a 'good job' on sustainability – possibly driven more by their levels of overall awareness than their actual sustainability efforts

## 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 = 1,119) SQ17r1: Which brands / businesses do you think are doing a good job when it comes to sustainability / the environment?