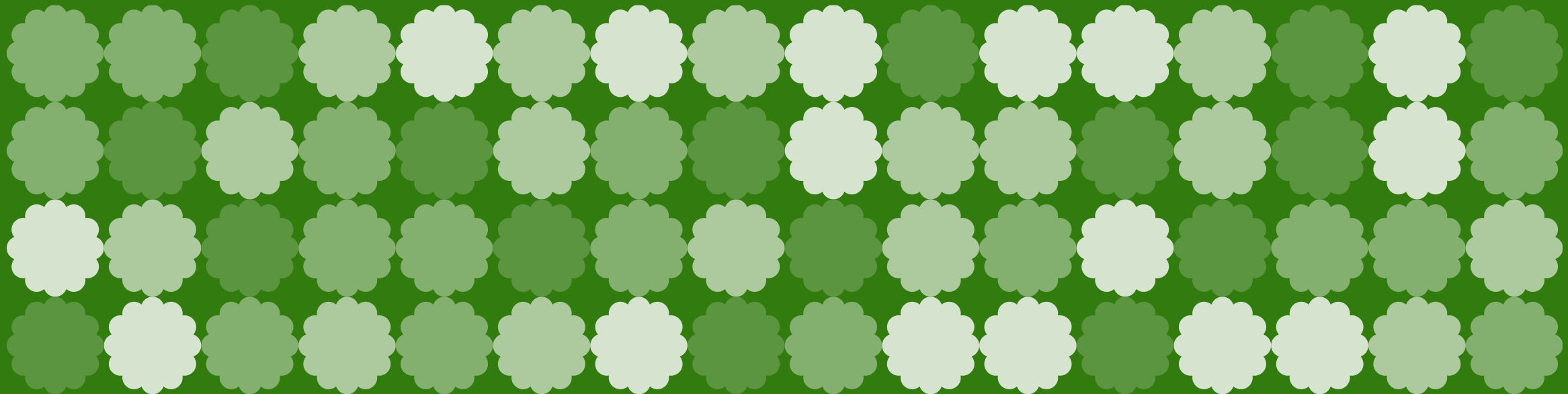


Sustainability – Consumers’ Attitudes Survey- October 2023



A REMINDER OF THE STUDY



The latest wave of our sustainability study took place in October 2023, with the next wave (wave 10) taking place in April 2024



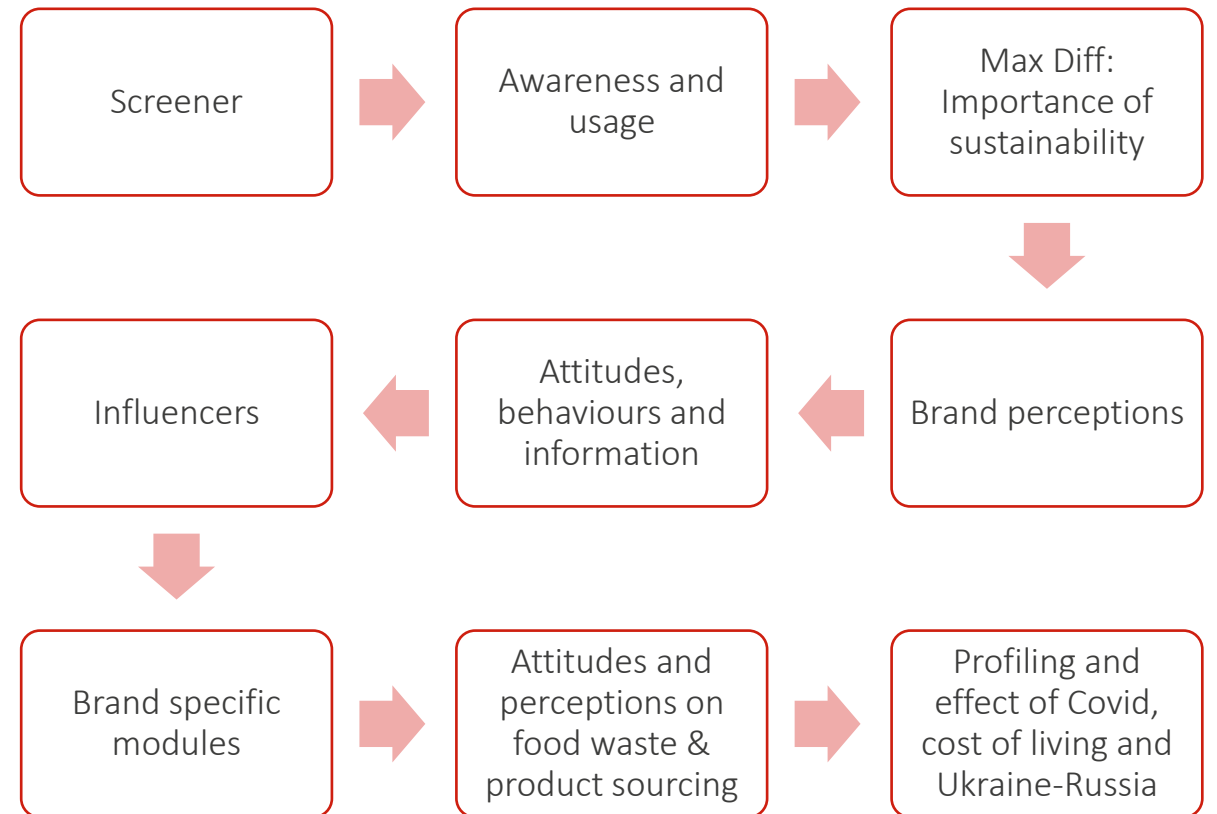
UK study representative of the 16+ population



In the latest wave we spoke to 4,078 people (+ a boost of 500 people in the GMCA region)



The survey takes about 20 minutes to complete

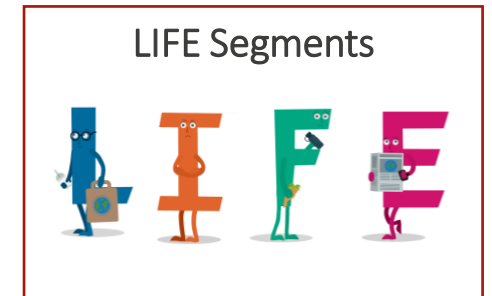
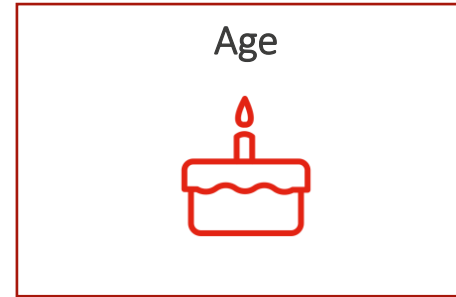
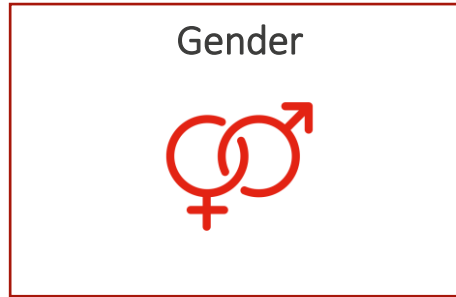


SUB-GROUPS

Throughout this report we have cut the data by several key sub-groups where base sizes have allowed:

Significant sub-group differences within the GMCA sample are indicated by grey boxes, while slides without any differences are indicated as such. In instances where there are a lot of significant sub-group differences, we have shown those which we feel are most relevant to GMCA.

Sub-group differences are only shown if the base size is bigger than 50.

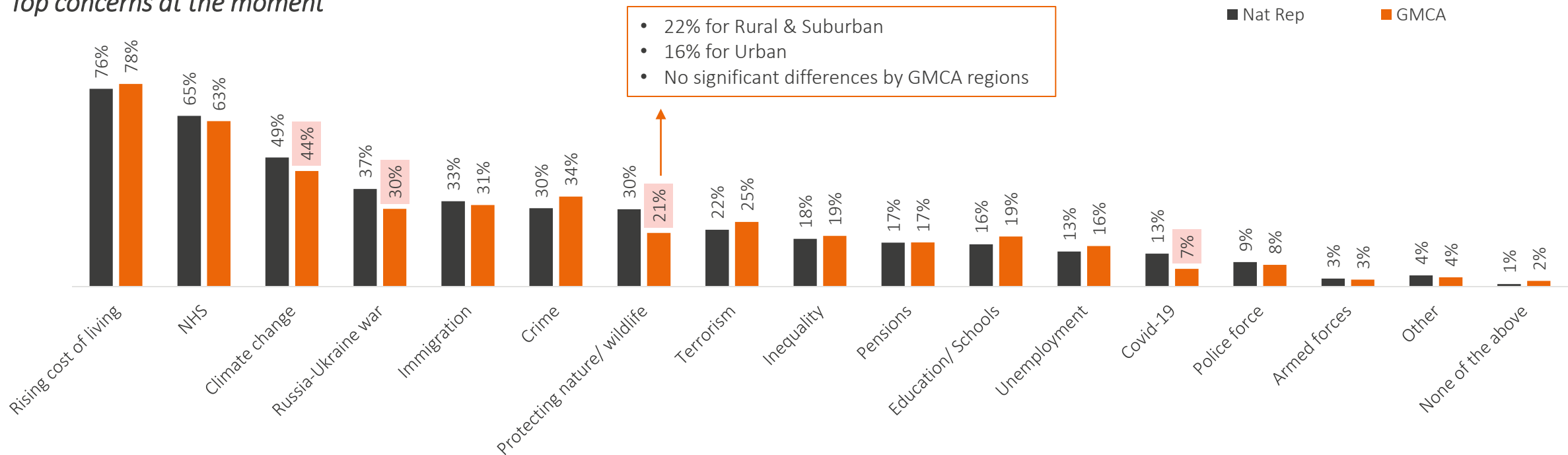


AREAS OF CONCERN

Significantly higher than the UK
Significantly lower than the UK

The rising cost of living is the biggest concern amongst GMCA residents followed by the NHS, in line with the UK. Although climate change is ranked 3rd, it is considered less important compared to the rest of the UK. We see a similar trend with 'protecting wildlife' which also has less strength of support than the UK average.

Top concerns at the moment



65+ GMCA

Were **more likely** to be concerned with the NHS (81%), Russia-Ukraine war (45%), and immigration (50%)

25-34 GMCA

Were **more likely** to be concerned with unemployment (31%) and **less likely** to be concerned about the NHS (48%)

Children in household GMCA

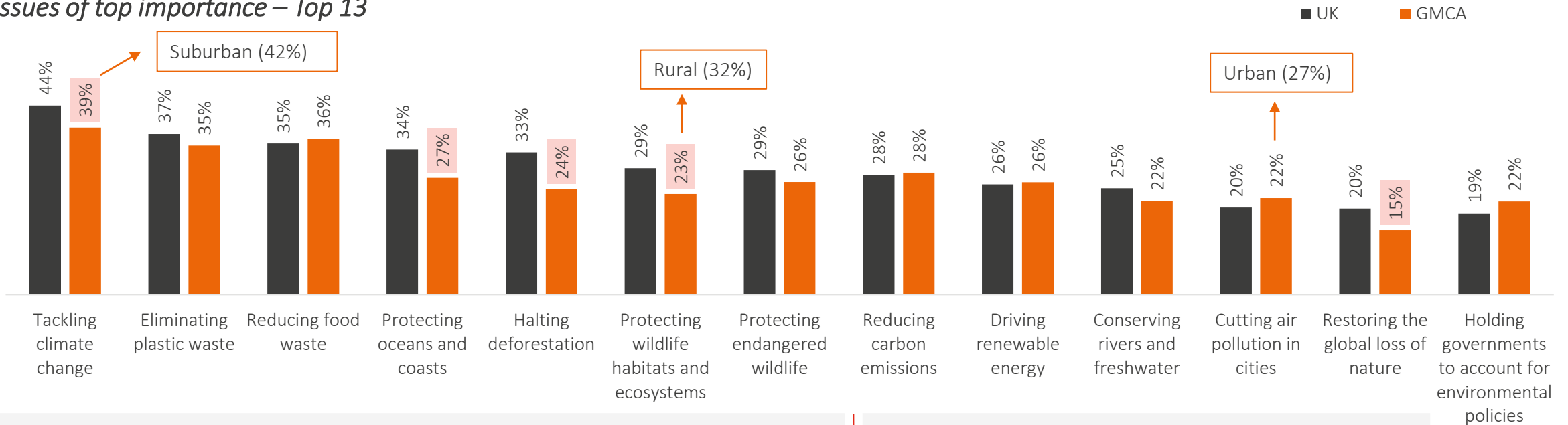
Were **more likely** to be concerned with education (29%) and **less likely** to be concerned about the NHS (50%)

Significantly higher than the UK
Significantly lower than the UK

GLOBAL ENVIRONMENTAL ISSUES – TOP IMPORTANCE (TOP 13)

Consistent with the UK, tackling climate change is the highest priority amongst GMCA residents, while they are significantly less likely than the UK to feel it’s important to protect certain environments, e.g. oceans and forests.

Issues of top importance – Top 13



Females GMCA

Were **more likely** to say reducing food waste (43%) and **less likely** to say driving renewable energy (17%)

65+ GMCA

Were **more likely** to say conserving rivers and freshwater (36%)

16-34 GMCA

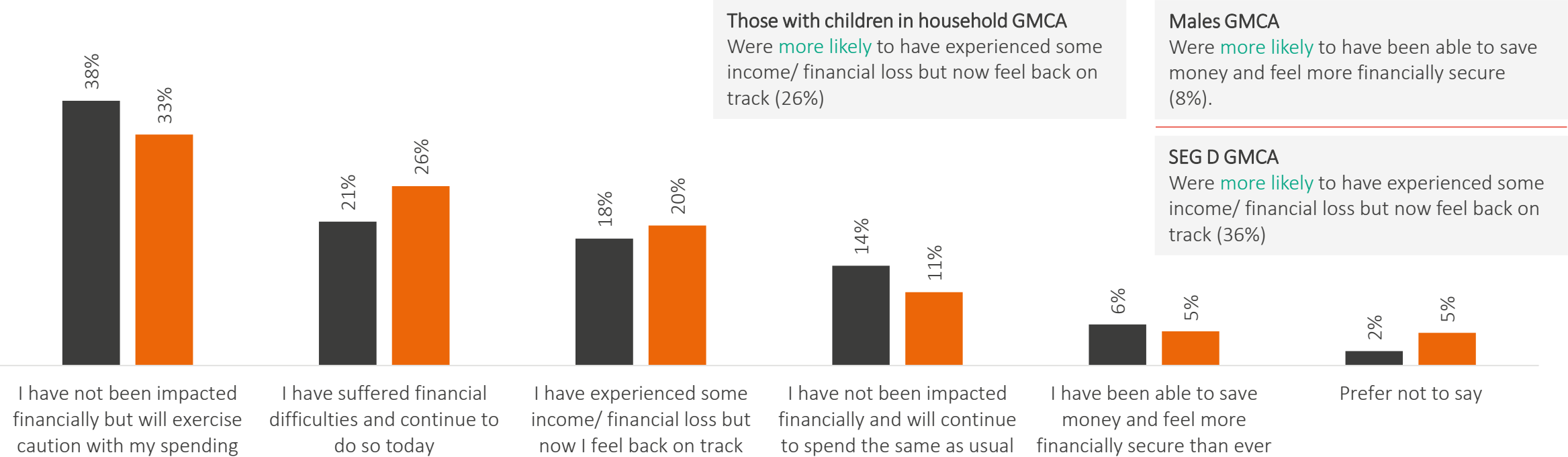
Were **more likely** to say reducing the impact of food on biodiversity loss (18%) and **less likely** to say conserving rivers and freshwater (13%) and protecting wildlife habitats and ecosystems (12%)

FINANCIAL SITUATIONS OF SHOPPERS

Over a third of consumers have not been impacted financially over the last 3 months but are still being cautious with their spending.

What financial situations have shoppers been in over the past 3 months?

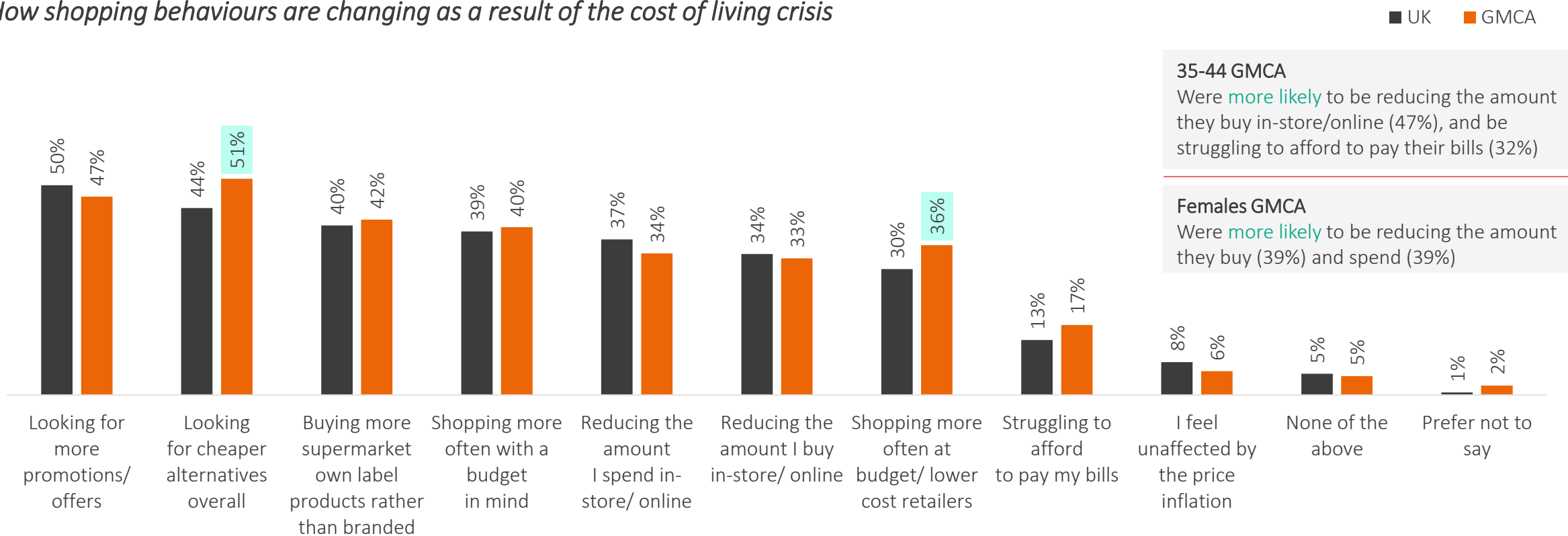
■ UK ■ GMCA



HOW IS THE COST OF LIVING CRISIS AFFECTING SHOPPING BEHAVIOURS?

Shoppers are looking for promotions and/or cheaper alternatives. GMCA residents are seeing similar behaviour changes, although they are more likely to be looking for cheaper alternatives and shopping more often at budget retailers.

How shopping behaviours are changing as a result of the cost of living crisis



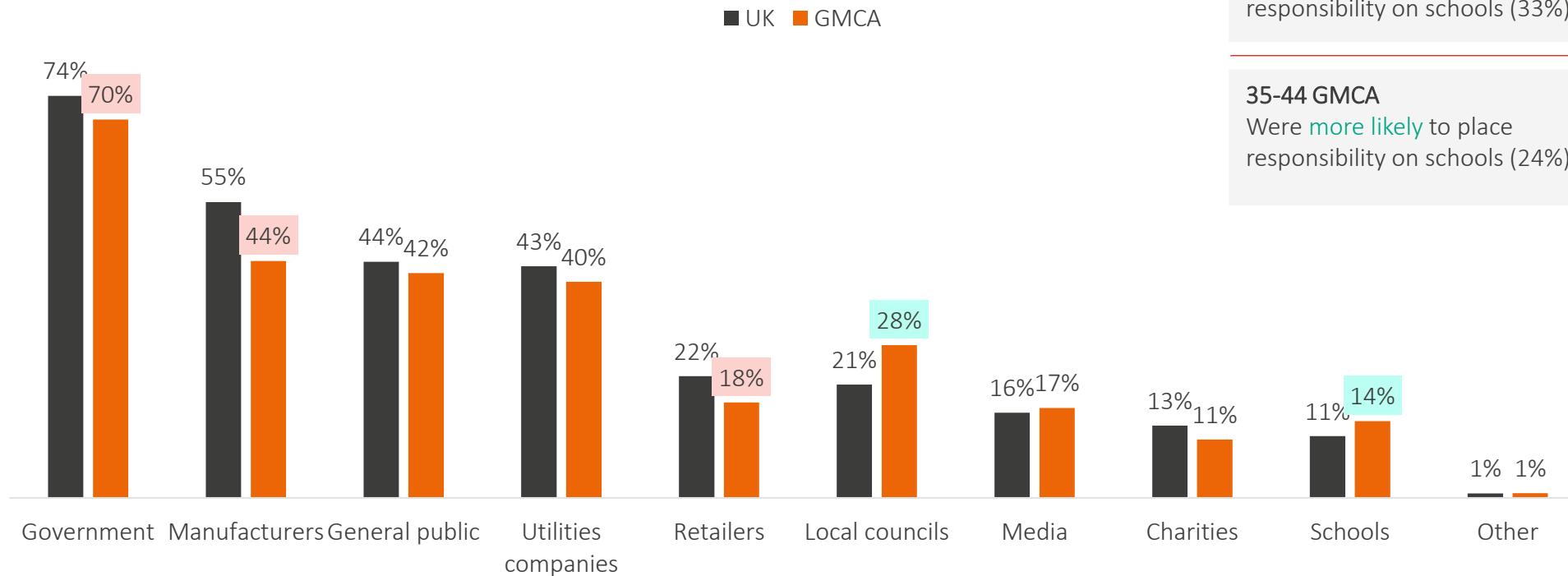
RESPONSIBLE FOR TACKLING CLIMATE CHANGE - PROMPTED

Significantly higher than the UK

Significantly lower than the UK

The Government is deemed most responsible for tackling climate change, consistent across GMCA and the UK. GMCA residents are also more likely to place responsibility on their Local Councils, putting pressure on GMCA to act. Schools are also important, especially amongst the 16-24 age cohort.

Responsibility for tackling climate change



16-24 GMCA
Were **more likely** to place responsibility on schools (33%)

25-34 GMCA
Were **more likely** to place responsibility on media (26%)

35-44 GMCA
Were **more likely** to place responsibility on schools (24%)

55-64 GMCA
Were **more likely** to place responsibility on utility companies (56%)

CONSUMER ATTITUDES (GREEN BEHAVIOURS AND PERCEPTIONS)

Significantly higher than the UK

Significantly lower than the UK

Recycling is of high priority to the UK and GMCA sample alike. GMCA residents are less likely to be making lifestyle compromises to benefit the environment.

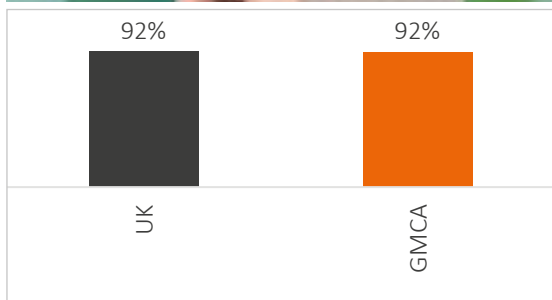
% Agree

I make a conscious effort to recycle

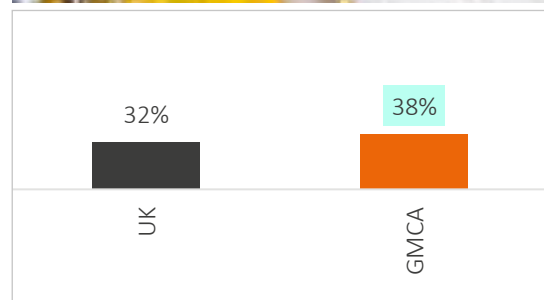
I don't really think about the amount of packaging on the products I buy

I make lifestyle compromises to benefit the environment

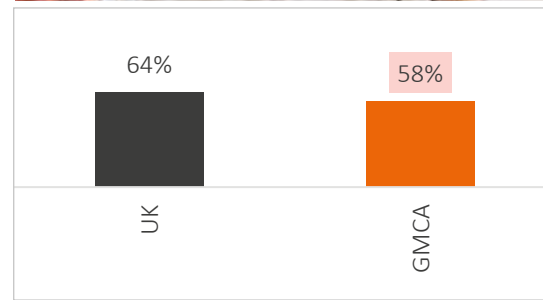
The environment is low priority compared to a lot of other things



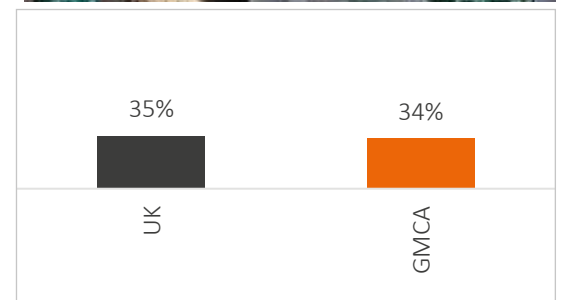
65+ GMCA
Were **more likely** to make a conscious effort to recycle (98%)



25-34 GMCA
Were **more likely** to not really think about the amount of packaging (53%)



Those with children in the household GMCA
Were **more likely** to make lifestyle compromises (65%)

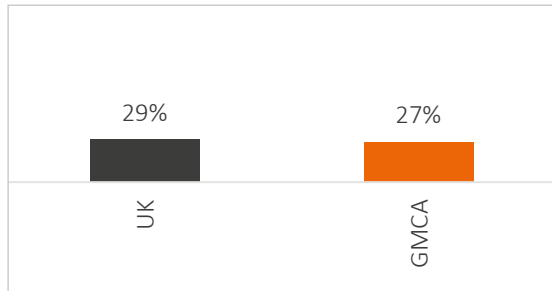


CONSUMER ATTITUDES (ENVIRONMENTAL CONCERN)

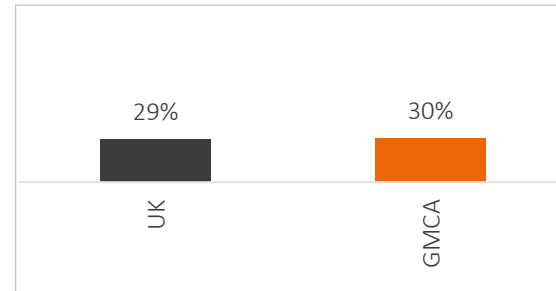
Over half of consumers are willing to pay more for products from companies committed to the environment, and are actively looking for information about the environment and climate change. There is no difference between GMCA residents and the UK average.

% Agree

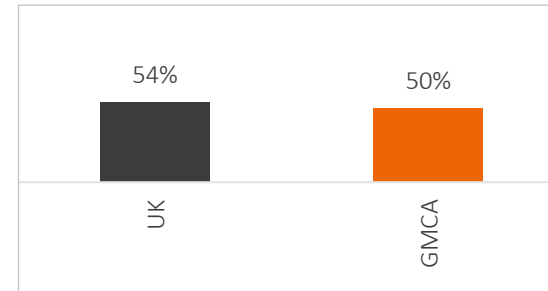
The effects of climate change are too far in the future to really worry me



It's not worth me doing things to help the environment if others don't do the same



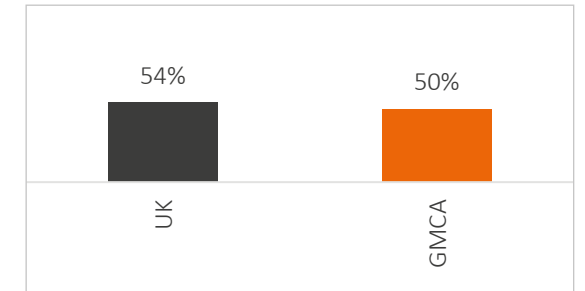
I'm willing to pay more for products from companies committed to the environment



25-34 GMCA

Were **more likely** to be willing to pay more to environmental companies (62%)

I actively look for information about the environment and climate change



25-34 GMCA

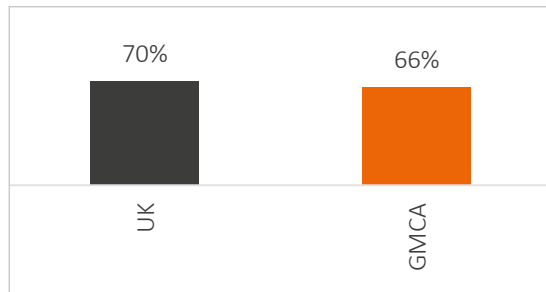
Were **more likely** to actively look for information (60%)

CONSUMER ATTITUDES (SOCIAL POLICIES)

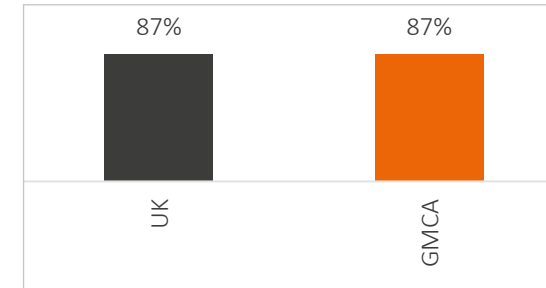
The majority of consumers believe plastic packaging should be banned and there should be greater investment in renewable energy. GMCA residents agree with these attitudes to a similar level as the UK average.

% Agree

The use of plastic in packaging should be banned



There should be greater investment in renewable energy

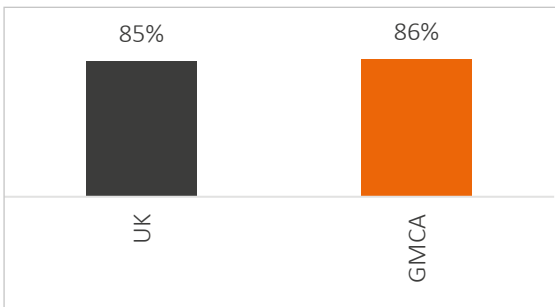


CONSUMER ATTITUDES (ENVIRONMENTAL BURDEN)

The burden is seen to lie the most with companies & the government to do more, but still consumers admit they could do more to help. The 35-44 age cohort in the GMCA region are most likely to want to do more and are therefore a key audience to engage.

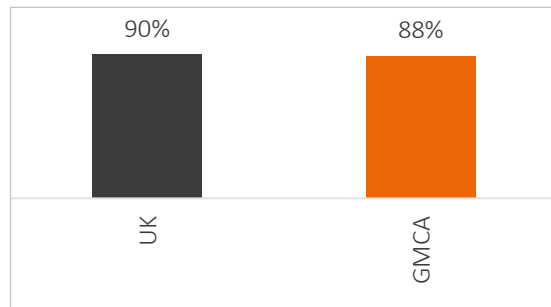
% Agree

The government need to do more to help the environment

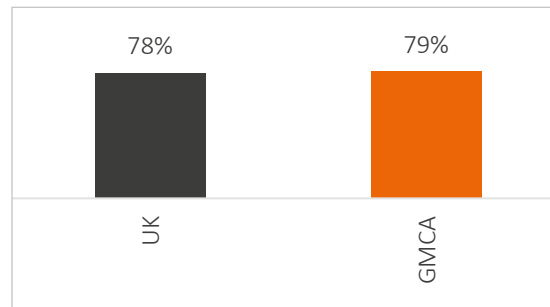


65+ GMCA
Were **less likely** to think the government needs to do more (77%)

Companies need to do more to help the environment

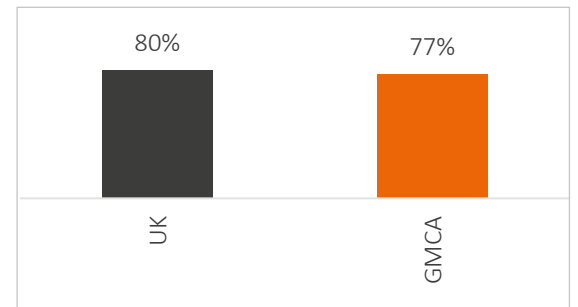


I could do more to help the environment



65+ GMCA
Were **less likely** to think they could do more to help the environment (63%)

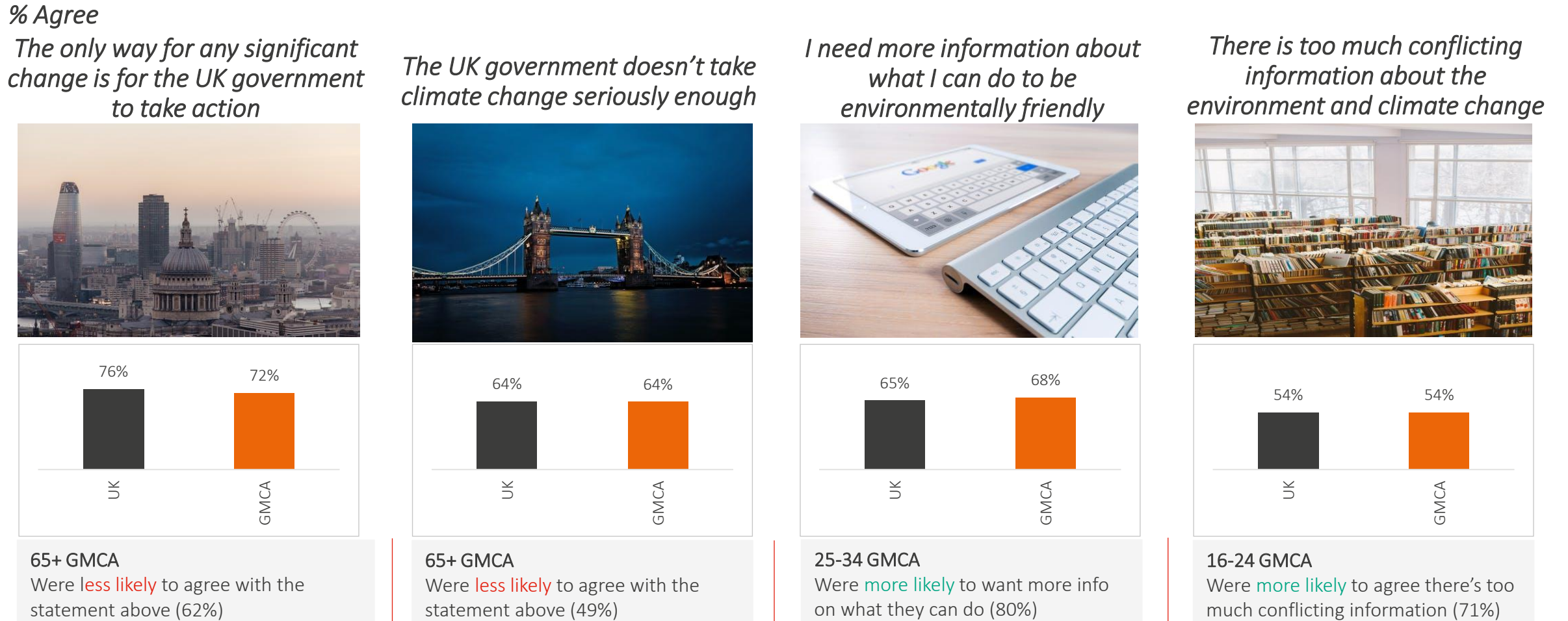
I want to do more to help the environment



35-44 GMCA
Were **more likely** to want to do more to help the environment (88%)

ATTITUDES TOWARDS CLIMATE CHANGE

GMCA residents have very similar attitudes towards climate change as the rest of the UK, with the majority believing the UK Government needs to take action for any significant change to be made.



ATTITUDES – TIME, EFFORT AND EASE

 Significantly higher than the UK
 Significantly lower than the UK

GMCA residents were less likely than the UK average to agree that being sustainable at home is easy. GMCA should focus on how they can support residents in making sustainability accessible at home. The 35-44 age cohort will be challenging due to time constraints, so for them it will be about the quick wins.

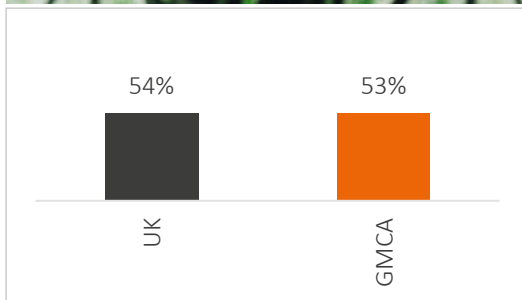
% Agree

It takes a lot of time to be environmentally-friendly

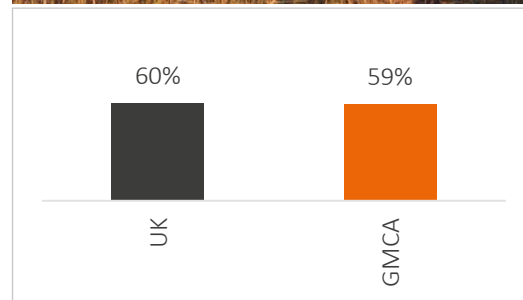
It takes a lot of effort to be environmentally-friendly

Being sustainable at home is easy

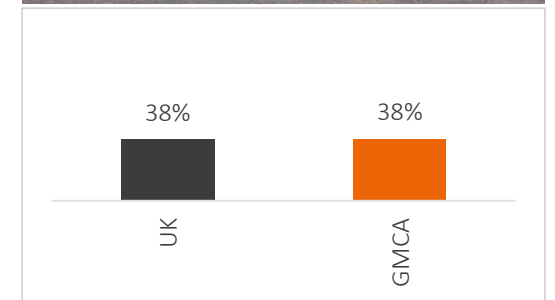
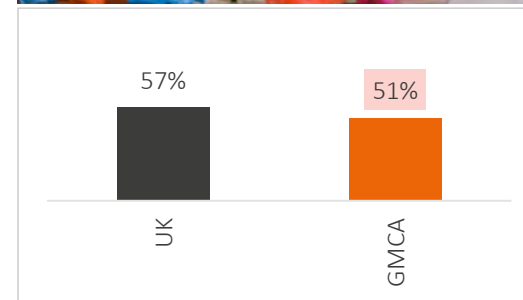
Being sustainable outside the home is easy



35-44 GMCA
 Were **more likely** to agree with the above statement (67%)



25-34 GMCA
 Were **more likely** to agree with the above statement (75%)



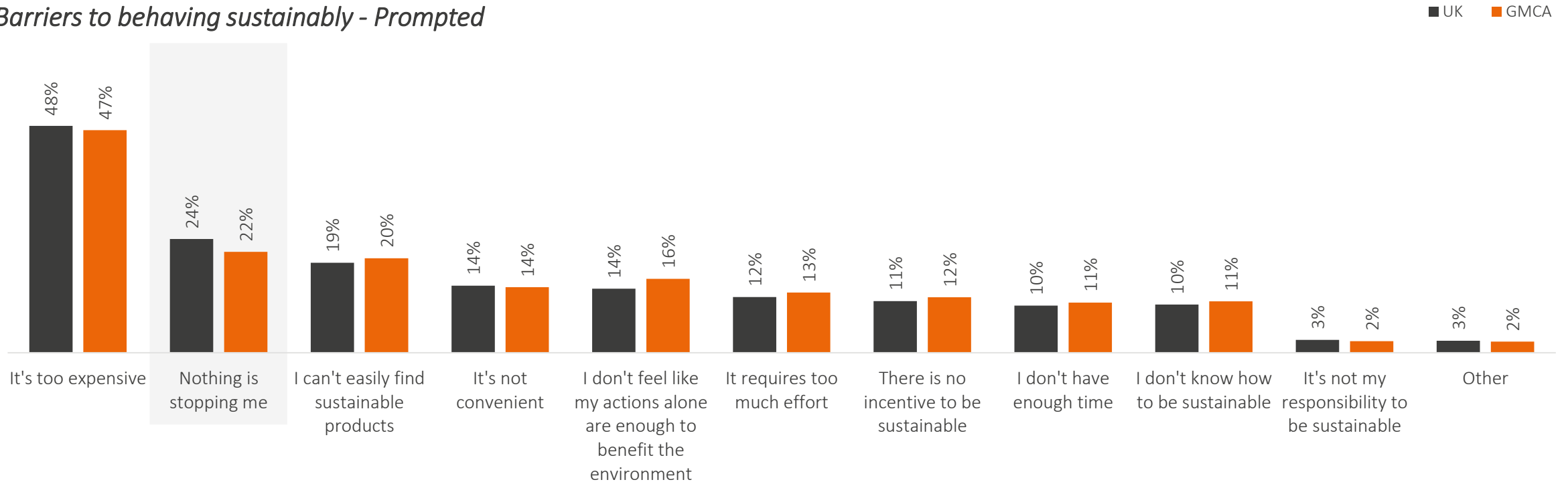
25-34 GMCA
 Were **more likely** to agree with the above statement (55%)

BARRIERS TO BEHAVING SUSTAINABLY

Significantly higher than the UK
Significantly lower than the UK

The price of behaving sustainably is the main barrier, with almost half of consumers perceiving sustainable behaviours to be expensive. Almost a quarter feel there is nothing stopping them, suggesting they are open to influence.

Barriers to behaving sustainably - Prompted



65+ GMCA

Were **more likely** to say nothing is stopping them (39%) and **less likely** to say it's too expensive (27%)

16-34 GMCA

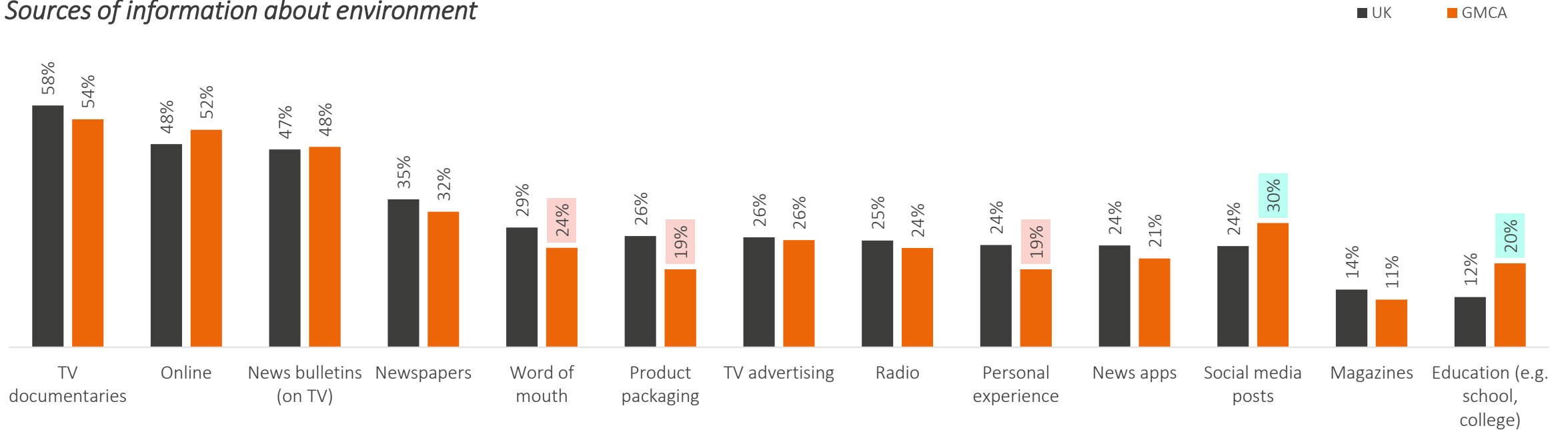
Were **more likely** to say it is too much effort (23%) and they don't have enough time (20%)

SOURCES OF INFORMATION

Significantly higher than the UK
Significantly lower than the UK

While TV documentaries, online channels and news bulletins are used most in the GMCA region (and the UK) for information about the environment, social media and education are also particularly important, and should be utilised to engage residents, especially those in the 16-34 age cohort.

Sources of information about environment



Females GMCA

Were **more likely** to find out about the environment through product packaging (27%)

65+ GMCA

Were **more likely** to find out about the environment through TV documentaries (71%), News Bulletins (76%), and newspapers (61%)

16-34 GMCA

Were **more likely** to find out about the environment through social media posts (41%), education (42%), and social media influencers (24%)

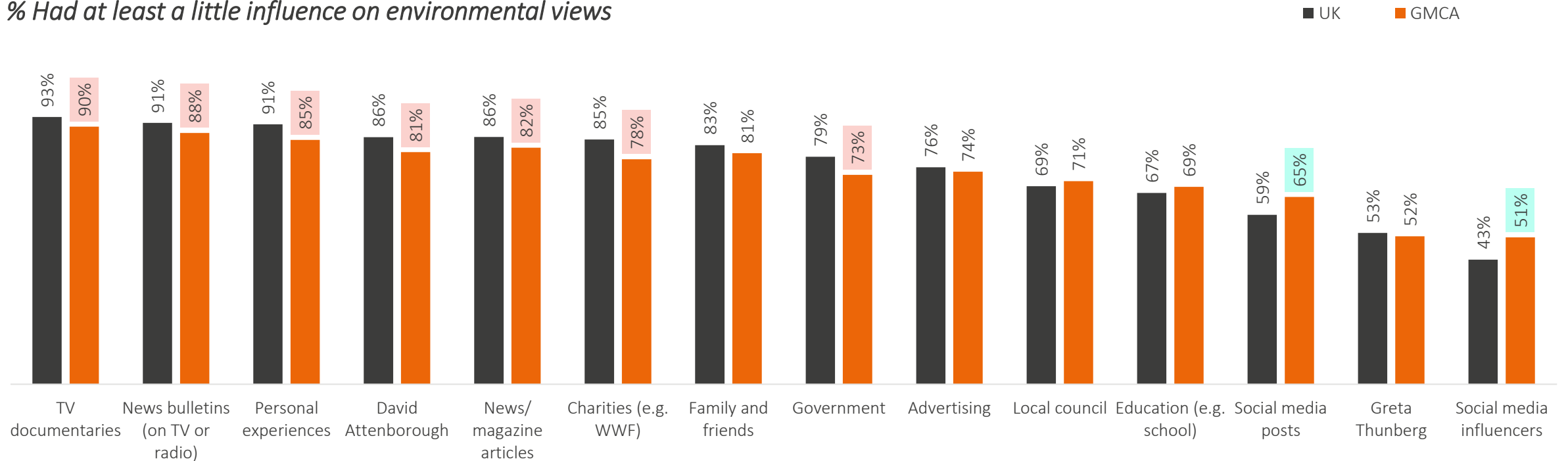
INFLUENCERS ON ENVIRONMENTAL VIEWS

Significantly higher than the UK

Significantly lower than the UK

TV documentaries and news bulletins are the biggest influencers on environmental views. However, local councils still influence around 7 in 10 residents. Once again, we see social media being of importance in the GMCA region.

% Had at least a little influence on environmental views



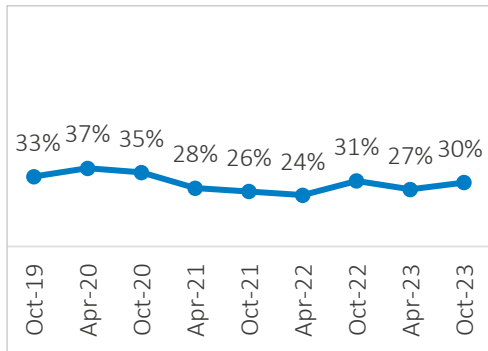
Age groups GMCA

Younger age groups (16-34) were **more likely** to be influenced by education (89% vs 49%), social media (88% vs 43%), and social media influencers (77% vs 30%) than older age groups (50+)

SEGMENT CHANGES FROM OCT-19 TO OCT-23

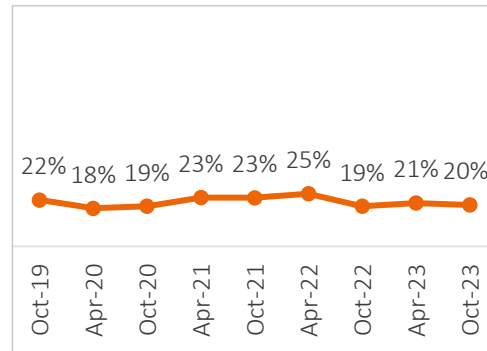
As part of our analysis, we identified four key segments based on environmental attitudes and behaviours. Data on how the sizes of the segments have changed since October 2019 can be found below.

Light Contributors



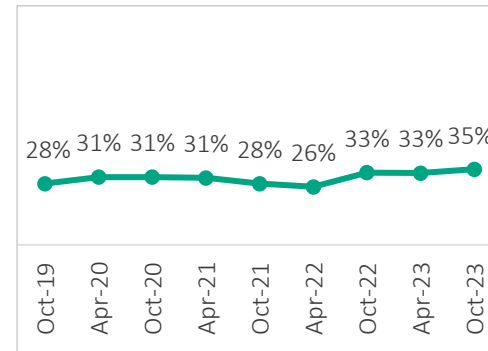
Low knowledge, have more basic environmental behaviours

Inactive Sceptics



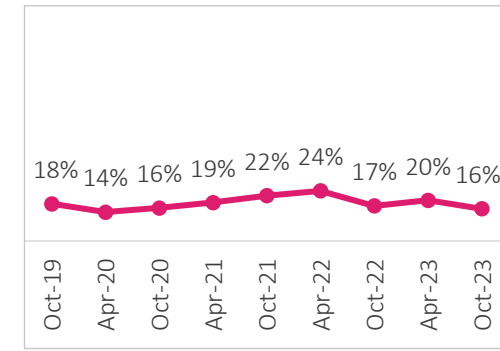
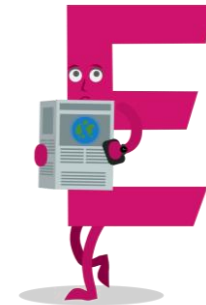
Don't know, don't care

Focused Achievers



Knowledgeable, positive attitudes and moving beyond basic environmental behaviours

Educated Non-Doers



Knowledgeable and positive attitudes, but not following through to action

OCT 23

GMCA 31%

GMCA 23%

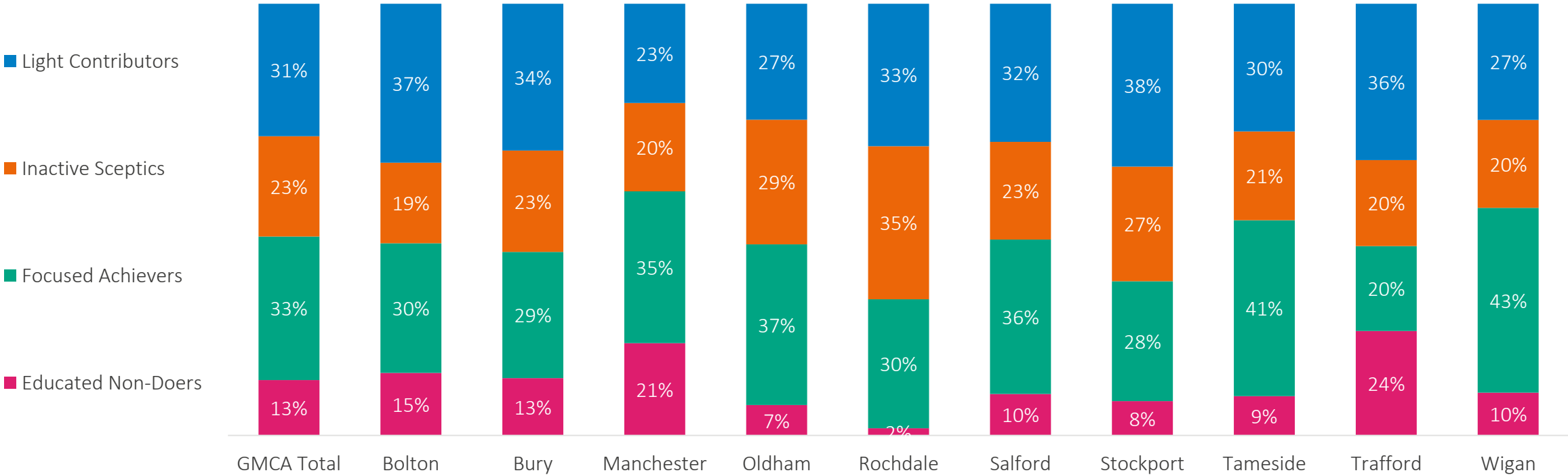
GMCA 33%

GMCA 13%

LIFE SEGMENTS IN GMCA REGIONS

Manchester and Trafford are more likely to have Educated Non-Doers, perhaps driven by having a higher proportion of residents aged 16-35. The Inactive Sceptics are most prevalent in Rochdale, suggesting this area will need the most support in encouraging residents to be more sustainable.

LIFE Segments within each region of GMCA

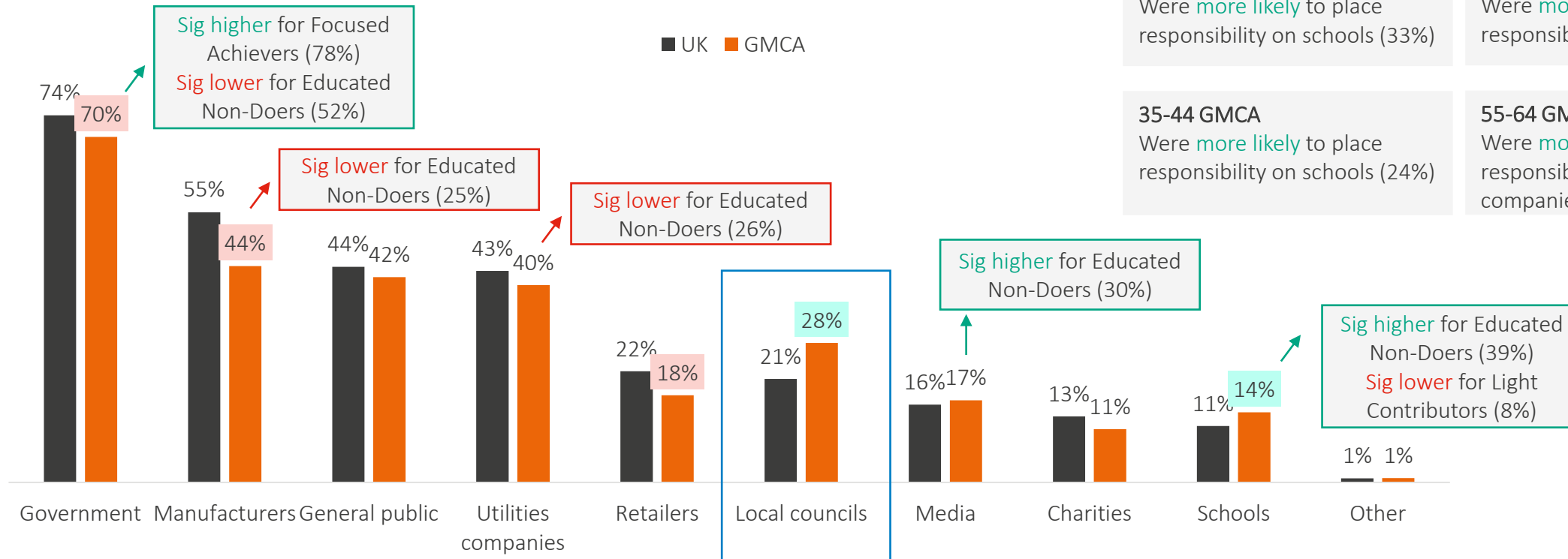


■ Significantly higher than the UK
■ Significantly lower than the UK

RESPONSIBLE FOR TACKLING CLIMATE CHANGE - PROMPTED

The Government is deemed most responsible for tackling climate change, consistent across GMCA and the UK. GMCA residents are also more likely to place responsibility on their Local Councils, putting pressure on GMCA to act. Schools are also important, especially amongst the 16-24 age cohort.

Responsibility for tackling climate change



16-24 GMCA
Were **more likely** to place responsibility on schools (33%)

25-34 GMCA
Were **more likely** to place responsibility on media (26%)

35-44 GMCA
Were **more likely** to place responsibility on schools (24%)

55-64 GMCA
Were **more likely** to place responsibility on utility companies (56%)

GLOBAL ENVIRONMENTAL ISSUES BY LIFE SEGMENTS

 Significantly higher than GMCA total sample

 Significantly lower than GMCA total sample

Column %	Total Nat Rep Sample	GMCA Total Sample	Light Contributors (GMCA)	Inactive Sceptics (GMCA)	Focused Achievers (GMCA)	Educated Non-Doers (GMCA)
Tackling climate change	44%	39%	42%	18%	55%	25%
Reducing food waste	35%	36%	42%	36%	32%	34%
Eliminating plastic waste	37%	35%	40%	17%	46%	25%
Reducing carbon emissions	28%	28%	33%	12%	36%	24%
Protecting oceans and coasts	34%	27%	32%	23%	27%	23%
Protecting endangered wildlife	29%	26%	26%	24%	29%	24%
Driving renewable energy	26%	26%	26%	17%	35%	18%
Halting deforestation	33%	24%	24%	22%	28%	20%
Protecting wildlife habitats and ecosystems	29%	23%	21%	18%	31%	18%
Cutting air pollution in cities	20%	22%	24%	13%	26%	27%
Conserving rivers and freshwater	25%	22%	23%	19%	21%	26%
Holding governments to account for environmental policies	19%	22%	19%	10%	31%	23%
Stopping poaching and the illegal wildlife trade	17%	18%	15%	21%	18%	20%
Reducing the public's impact on the environment	17%	18%	18%	8%	25%	18%
Ensuring food is from sustainable sources that protect nature and wildlife	17%	15%	14%	5%	21%	20%
Restoring the global loss of nature	20%	15%	14%	12%	20%	10%
Businesses reducing their environmental impacts	13%	13%	12%	8%	16%	15%
Improving livelihoods in developing countries to reduce environmental impact	11%	12%	9%	7%	18%	14%
Protecting the Arctic Protecting the polar regions	15%	12%	12%	8%	13%	14%
Sustainable mining and use of oil/gas	10%	10%	10%	10%	7%	18%
Reducing the impact that the food we eat in the UK has on biodiversity loss	10%	10%	7%	9%	9%	19%
Driving sustainable fishing that protects fish stocks	11%	10%	6%	11%	13%	9%
Ensuring the palm oil used in the products we consume is from sustainable sources	10%	9%	6%	9%	8%	17%
Ensuring soy produced to feed our livestock is from sustainable sources	3%	5%	3%	5%	4%	13%
None of the above	2%	6%	3%	17%	0%	6%

BEHAVIOURS BY LIFE SEGMENTS

■ Significantly higher than GMCA total sample

■ Significantly lower than GMCA total sample

Column %	Total Nat Rep Sample	GMCA Total Sample	Light Contributors (GMCA)	Inactive Sceptics (GMCA)	Focused Achievers (GMCA)	Educated Non-Doers (GMCA)
Recycle	82%	81%	86%	74%	85%	71%
Use 'bags for life'	80%	79%	87%	79%	83%	50%
Use the heating only when I need to	72%	71%	77%	69%	79%	39%
Hang clothes to dry on the line rather than in a dryer	67%	63%	72%	55%	72%	35%
Only buy what is necessary rather than waste food	63%	60%	58%	47%	78%	41%
Travel by foot (i.e. walk)	62%	59%	59%	53%	68%	49%
Use a refillable water bottle	60%	56%	59%	45%	68%	39%
Use public transport	47%	51%	51%	37%	64%	45%
Buy wonky fruit and veg	57%	51%	50%	44%	66%	31%
Use a smart meter	45%	48%	52%	41%	52%	40%
Buy products with recyclable packaging	55%	43%	44%	22%	65%	20%
Ignore best-by, sell-by and use-by dates	47%	42%	44%	40%	50%	19%
Buy good quality clothes that last longer	48%	42%	39%	28%	54%	40%
Flush the toilet every time you use it	38%	41%	45%	50%	30%	47%
Wash clothes in water less than 30 degrees	41%	40%	32%	29%	57%	35%
Avoid buying single use plastic	41%	36%	28%	14%	62%	27%
Use paper or metal straws	38%	35%	38%	23%	41%	36%
Buy second-hand clothes	35%	34%	30%	29%	46%	24%
Use a reusable coffee cup	34%	33%	30%	14%	47%	36%
Travel by plane	32%	32%	38%	34%	27%	28%
Buy local produce	43%	31%	30%	14%	45%	26%
Eat little or no meat	28%	22%	16%	8%	37%	18%
Use a smart thermostat	17%	18%	21%	9%	22%	15%
Grow your own fruit and veg	23%	15%	14%	8%	20%	17%
Travel by bike	14%	13%	7%	10%	20%	16%
Eat/ drink little or no dairy products	15%	12%	8%	6%	18%	20%
Use a hybrid car	8%	8%	7%	8%	7%	10%
Use solar panels	9%	6%	7%	3%	8%	7%
Use an electric car	5%	3%	4%	3%	4%	2%
None of the above	0%	1%	0%	2%	1%	2%

Next Steps

- Further analysis to be undertaken between behaviour insights research undertaken in May and this survey
- Produce key findings briefings and identify areas within new five-year plan which require further insights to further understand barriers and drivers/incentives to enable change
- Explore with the communications challenge group how the 'LIFE' personas can be used to shape and test future communication campaigns

Recommendations

- That the presentation and next steps be noted.