

EVERYDAY SUSTAINABILITY – UK – 2023

As incomes continue to be squeezed, brands can guide consumers towards everyday sustainable behaviours by communicating the cost-saving benefits.



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Everyday Sustainability – UK – 2023

This report looks at the following areas:

- Economic, social and legal factors impacting brands' and consumers' sustainability efforts
- Consumer perception of own environmentally friendly lifestyle
- Changes to environmentally friendly lifestyle compared to a year ago
- Barriers to leading a more environmentally friendly lifestyle
- Consumers' consideration of sustainability when shopping across selected categories
- Cost-saving sustainable behaviours adopted by consumers over the past 12 months
- Consumer attitudes towards sustainability, including brands' sustainability efforts and greenwashing



As incomes continue to be squeezed, brands can guide consumers towards everyday sustainable behaviours by communicating the cost-saving benefits.

Overview

Despite the cost-of-living crisis and price being at the forefront of consumer decisions, an overwhelming majority, 82%, of adults perceive their lifestyles to be environmentally friendly, and 25% say their lifestyle is more environmentally friendly compared to a year ago.

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Report Content

EXECUTIVE SUMMARY

Opportunities

- Communicate savings potential of sustainable living
- Tap into younger generations' interest in social media and technology to encourage sustainability
- Engage apathetic males in sustainability through their interests and hobbies

Market dynamics and outlook

- Inflation has driven a more economical and sustainable consumer mindset
- The economic environment has not dampened consumer sentiment towards sustainability
- The severity of climate crisis is growing, but some progress is being made

What consumers want and why

- The overwhelming majority of Brits are at least somewhat sustainable
- A quarter of Brits have become more environmentally friendly in the past year
 - Graph 1: consumer perception of own environmentally friendly lifestyle compared to a year ago, 2023
- The accessibility of sustainable products needs to be addressed
- Consumers consider sustainability the most in food and drink purchases
 - Graph 2: consideration of sustainability when shopping across selected categories, 2023
- Consumers are reacting to rising energy and food prices
- Greenwashing is firmly on consumers' radar
 - Graph 3: attitudes towards sustainability and greenwashing, 2023

MARKET DYNAMICS

Macro-economic factors

- Inflation is still the key factor affecting consumers' finances
 - Graph 4: CPI inflation rate, 2021-23
- Interest rates will rise in importance over the remainder of 2023 and into 2024
- The recovery of consumer finances has begun
 - Graph 5: the financial wellbeing index, 2016-23
- Sustainable living has remained a priority...
- ...while inflation has helped drive some sustainable behaviour

Social, environmental and legal factors

- UK temperature is on the rise
 - Graph 6: Annual mean of maximum air temperature, 2010-22

- UK greenhouse gas emissions continue to decline
 - Graph 7: estimated territorial greenhouse gas emissions, 2012-22
- Transport sector accounts for a third of total carbon emissions
 - Graph 8: carbon dioxide emissions, by sector, 2022 (p)
- COP27 falls short on making significant climate progress
- Significant push is needed to hit household recycling target by 2025
- A number of barriers to effective recycling in the UK need to be addressed
- UK government plans to address low recycling rates
- The rise of greenwashing hinders sustainable action
- Regulatory bodies ramp up efforts to tackle greenwashing

WHAT CONSUMERS WANT AND WHY

Consumer perception of own environmentally friendly lifestyle

- The majority of consumers lead an environmentally friendly lifestyle
 - Graph 9: consumer perception of own environmentally friendly lifestyle, 2023
- ...but more effort is still required by all to achieve positive climate action
- Financial situation impacts ability to be sustainable...
 - Graph 10: consumers who claim to lead a somewhat or very environmentally friendly lifestyle (NET), by financial situation, 2023
- City living can enable more sustainable living
 - Graph 11: consumers who perceive their lifestyle to be very environmentally friendly, by area, 2023

Changes in sustainable living

- One in four consumers have become more environmentally friendly this year
 - Graph 12: changes in sustainable living compared to a year ago, 2023
- The very sustainable are committed to progress
- Younger generations are on a sustainable journey
 - Graph 13: consumer perception of own environmentally friendly lifestyle compared to a year ago, by generation, 2023
- Support young adults to create a more sustainable future...
- ...while encouraging older adults to expand their repertoire of behaviours

Barriers to sustainable living

- Sustainable living is perceived to be expensive
 - Graph 14: barriers to leading a more sustainable lifestyle, 2023
- Women are even more aware of the cost of being sustainable
 - Graph 15: 'Buying environmentally friendly products is too expensive', by gender and age, 2023
- Consumers with weaker finances feel priced out of being sustainable
 - Graph 16: 'Buying environmentally friendly products is too expensive', by financial situation, 2023

- There is a need for more affordable, sustainable products
- Use social media to promote local facilities and services to Gen Z
- Prove to consumers they can make meaningful environmental impact...
- ...and target men through their interests and hobbies
- Currys offers instant payments for trade-ins

Sustainability considerations when shopping

- A third of consumers consider sustainability a high priority when buying food and drink
 - Graph 17: consideration of sustainability when shopping across selected categories, 2023
- Market sustainable innovations to young foodies
 - Graph 18: consideration of sustainability when shopping for food and drink, by age, 2023
- A consistent rise in ethical and environmental product launches over the last five years
 - Graph 19: proportion of launches carrying ethical/environmental claims, by sector, 2019-23
- Young adults prioritise sustainability more in their purchases
 - Graph 20: consumers who consider sustainability a high priority across selected categories, by age, 2023
- Sustainable holidays need to be accessible and compromise on quality

Cost-saving sustainable behaviours

- Engage financially motivated consumers through money-saving sustainable behaviours
 - Graph 21: cost-saving sustainable behaviours consumers have done in the last 12 months, 2023
- Rising energy costs have driven sustainable household habits
- E.ON pushes the message that time is running out
- Educate young adults on domestic sustainable behaviours
 - Graph 22: proportion of consumers who have reduced their energy usage at home in the last 12 months, by age, 2023
- Reducing food waste becomes a higher priority to consumers
- Supermarkets ramp up efforts to tackle food waste
- Oddbox's fight against food waste message is clear
- Brands should build on unintentional sustainable behaviours
 - Graph 23: consumers who have bought an item second-hand or repaired an item in the last 12 months, by how much they consider sustainability a priority when shopping for clothing, 2023
- The appeal for renting is there amongst younger generations
 - Graph 24: proportion of consumers who have rented an item instead of buying a new one in the last 12 months, by generation, 2023
- Target young families with rental services
 - Graph 25: proportion of consumers who have rented an item instead of buying a new one in the last 12 months, by lifestage and age, 2023
- Convince consumers of the long-term financial benefits of being sustainable
 - Graph 26: 'Being sustainable saves people money in the long term', by consumer perception of own environmentally friendly lifestyle, 2023

Attitudes towards sustainability

- Consumers are getting more savvy on greenwashing
 - Graph 27: attitudes towards sustainability and greenwashing, 2023
- Patagonia makes headlines with serious commitment to the planet
- There need to be solutions to help consumers make the right sustainable choice
 - Graph 28: attitudes towards sustainability and transparency, 2023
- Young, sustainable adults want easy-to-understand environmentally friendly product claims
- Digital passports provide transparency and help close the information gap...
- ...and can help foster a community of conscious customers
- Consumers are undecided on third-party certifications

APPENDIX

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology

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