

# Principles

INSIGHT



Sustainable development:  
understanding consumer's  
priorities

July 2019

# Sustainable development



## The war on plastic and beyond

This year has seen brands embark on a war on plastic. The discovery and exposing of the Great Pacific Garbage Patch has alerted consumers, brands and governments to the need to reduce our plastic waste.

But our plastic addiction is not the only thing we need to give up. As a society we need to significantly reduce our carbon footprint so that we can start to mitigate the impact of climate change.

At Principles Insight we wanted to look at what brands should focus on next, after plastic, to meet the needs of consumers who want to act to save the planet.

# Key findings

Consumers are a receptive audience for sustainability messaging. They care.

Moreover, their general level of concern has increased over the past year. The trends that we've seen towards changing plastic use are likely to continue in other areas.

There is a burgeoning trend towards buying local. Consumers have told us that they are willing to pay more for locally produced items, and that they intend to buy more locally sourced produce over the next year.

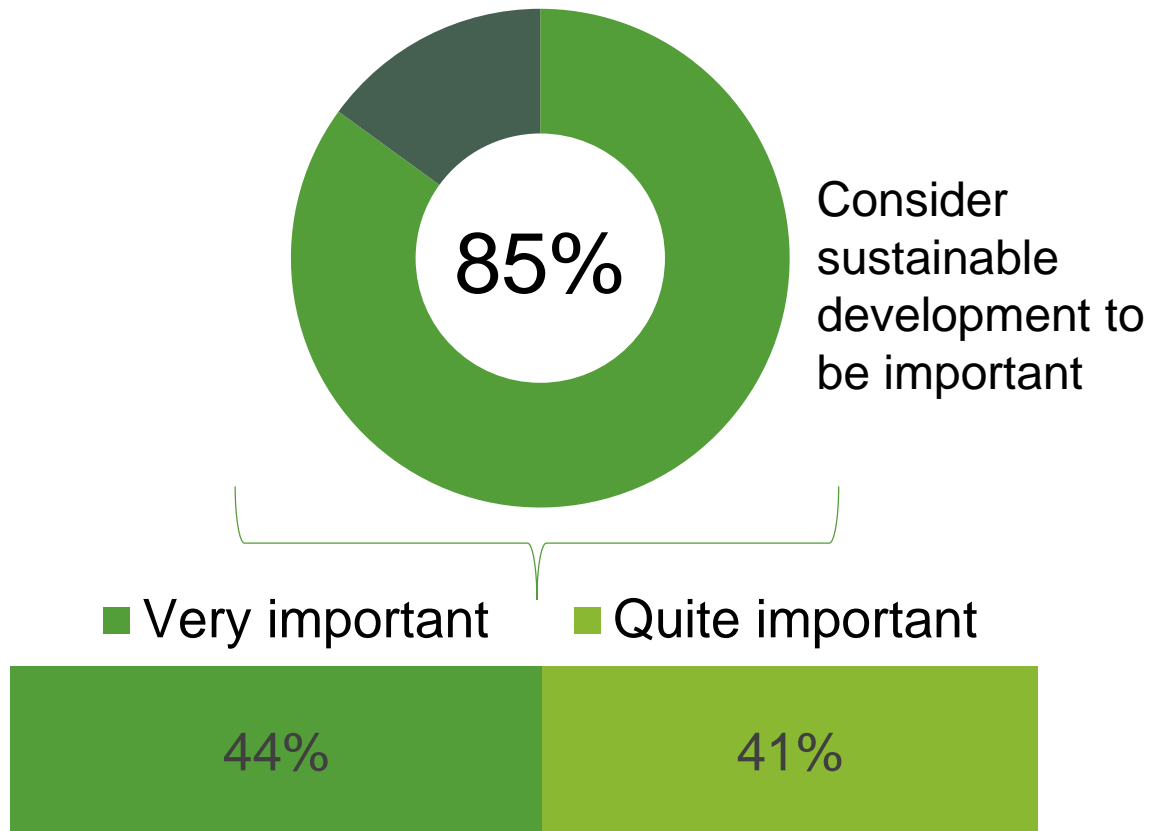
**Brands in this space should clearly communicate the locality of the produce they sell.**

While younger consumers report higher levels of concern regarding sustainability, it is older people who are taking more steps to combat the effects of climate change. Younger consumers want brands to make it easy for them to buy green.

**Clearly explain the credentials of your product or service, and why it supports a sustainable lifestyle.**

# Overall importance

The vast majority of consumers consider sustainable development important. Moreover, their level of concern has increased over the past year.



## Younger consumers are more likely to regard sustainability as important

- > 89% of under 35s feel sustainable development is important compared to 81% of those aged 55+.
- > Consumers in the South also share the heightened sense of importance; 89% view sustainability as important, and a majority (52%) regard it as “very important”.

## Two-thirds say their concern has increased over the last year

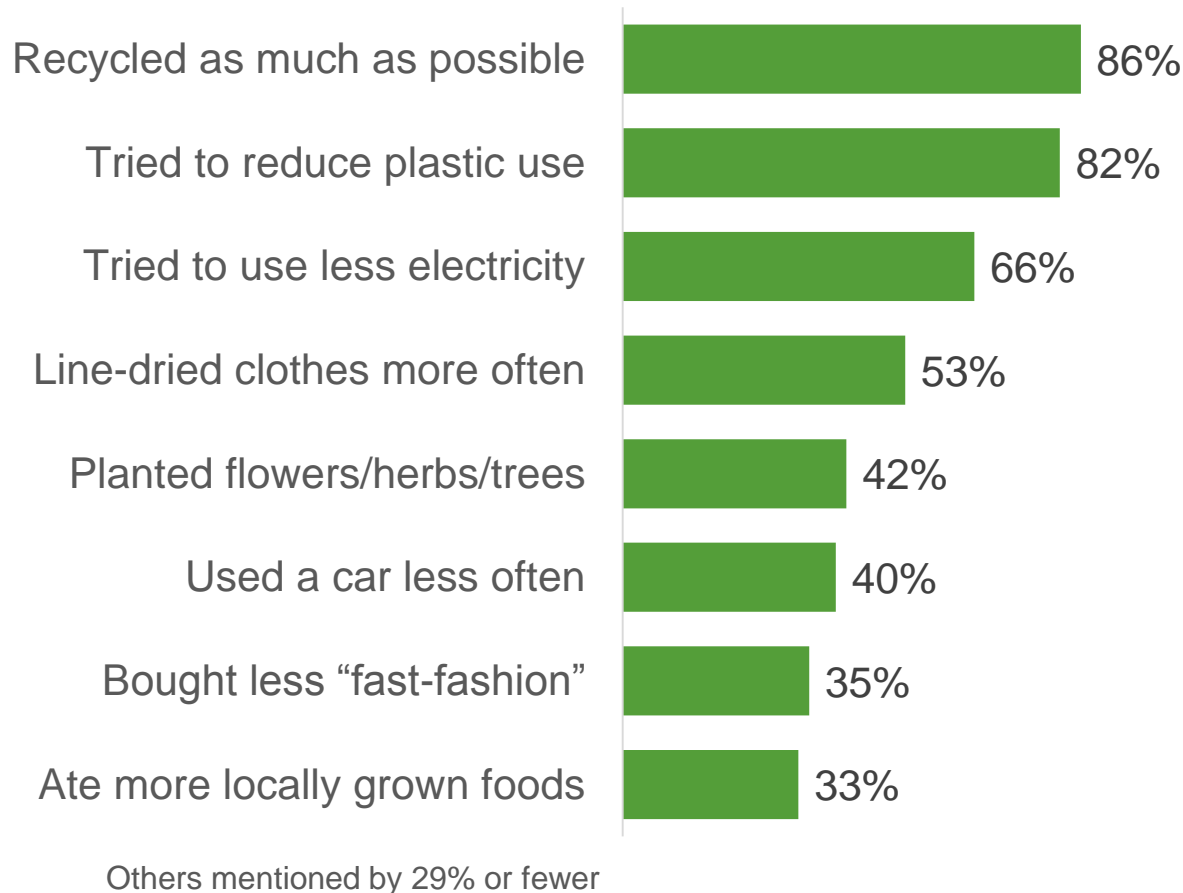
- > Furthermore, concern is growing amongst consumers. 69% told us that they are more concerned than they were a year ago.

Consumers are taking a number of steps to reduce their environmental impact.

# Consumer actions

While younger consumers report higher levels of concern, older people are taking more steps to combat the effects of climate change. Recycling and reducing plastic are the primary actions.

## Steps taken over the last year



## 9 in 10 consumers have taken steps to reduce their environmental impact

- > Over 55s lead the way on recycling (91%) and using less plastic (90%). Over 55s also over-index for using less electricity, planting more flowers, herbs or trees, and eating more sustainably caught fish.
- > Younger consumers lag behind, only 79% of under 35s say they recycle as much as possible.

These trends are expected to continue over the next year, with an increasing focus on eating locally grown foods.

# Planned future steps

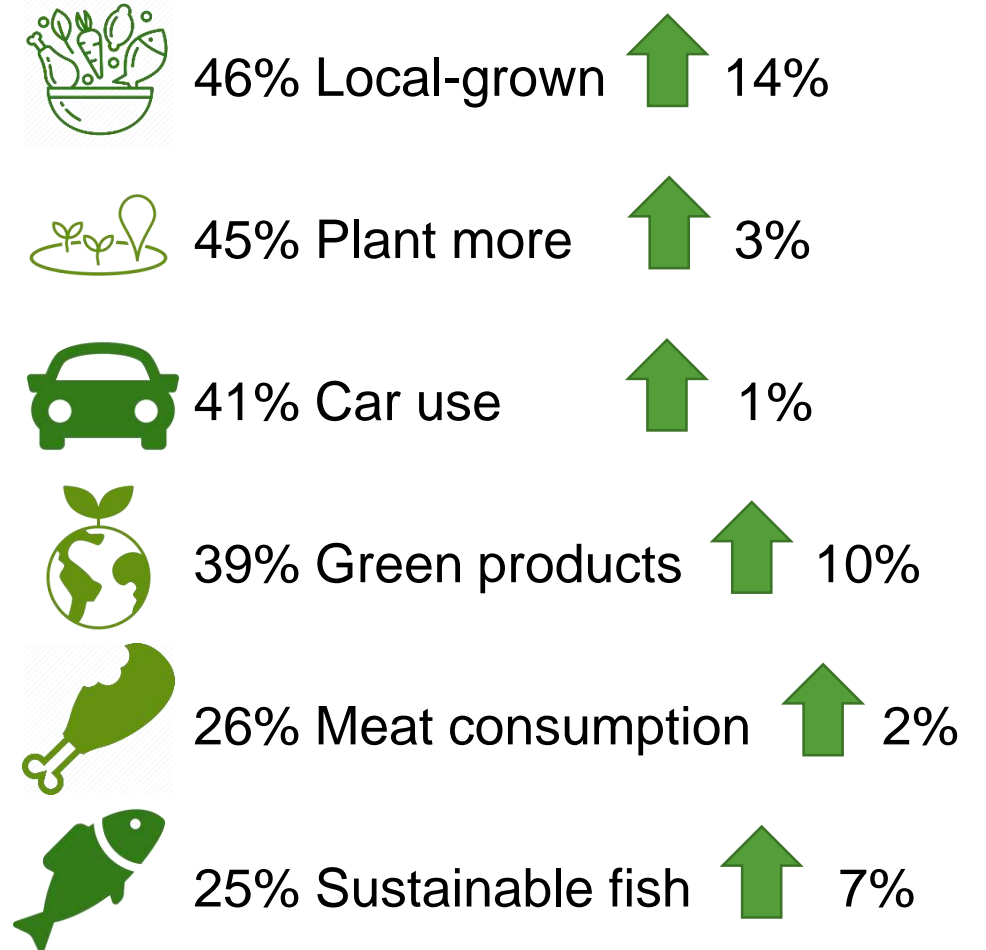
Over the next year consumers are looking to buy more products that have less impact on the environment. There will be an increasing focus on eating locally grown foods and buying greener products.

## Older consumers plan to lead the way

- > Those aged 55+ intend to take an average of six steps over the next year to reduce their environmental impact, compared to 5.7 for 35-54s and 4.9 for under 35s.

## Consumers want to buy greener

- > The key for brands is clearly communicate the green credentials of your products or services. Consumers will be increasingly seeking local products or those that have a low environmental impact.





# Reducing plastic use

Reducing plastic use has achieved major cut-through. Consumers plan to take a number of actions to cut their plastic addiction.

## Plastic plans



Only 3% say they will not take any of the above steps

## Older consumers plan to avoid plastic if at all possible

- > Those aged 55+ are significantly more likely than younger age groups to say they will avoid plastic packaging wherever possible (74%)
- > They are also significantly more likely to say they plan to buy fewer single use plastics (71%)

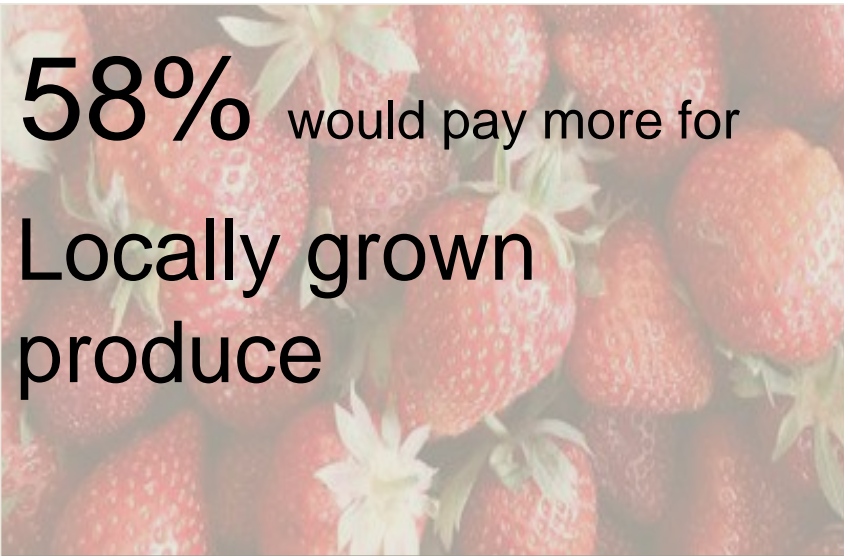
## Women more likely than men to plan to reduce plastic buying

- > Women are significantly more likely than men to plan to re-use plastic more often (78%), avoid items with excessive plastic packaging (66%), or look for alternatives (63%),

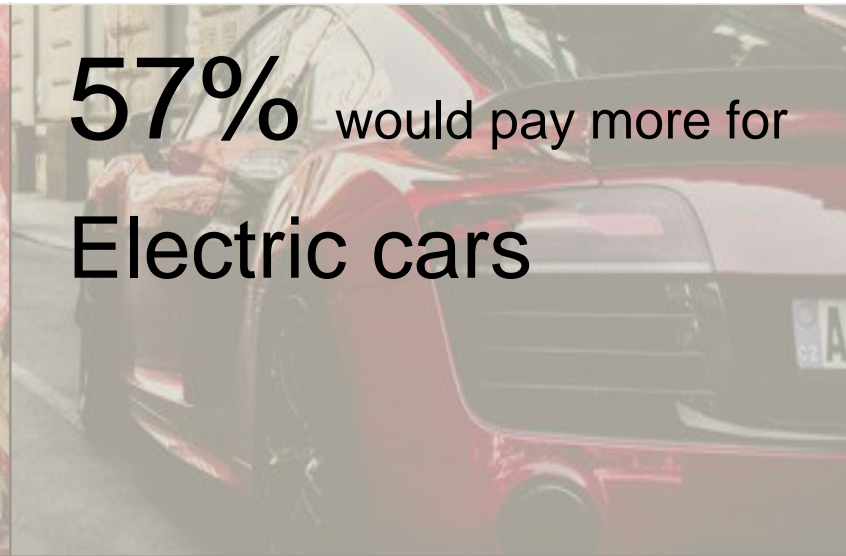
We gave consumers a range of six popular products or services and asked what they would be willing to pay for sustainable alternatives.

# Willingness to pay

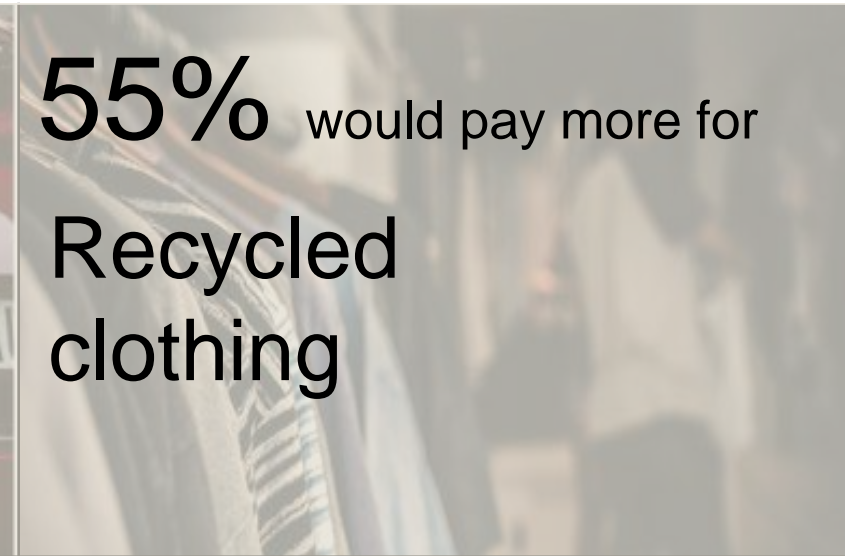
Around half of consumers would be willing to pay more for items in our basket of goods, with an average uplift of 8%. Locally grown produce in particular resonates strongly, with an increase of 16%.



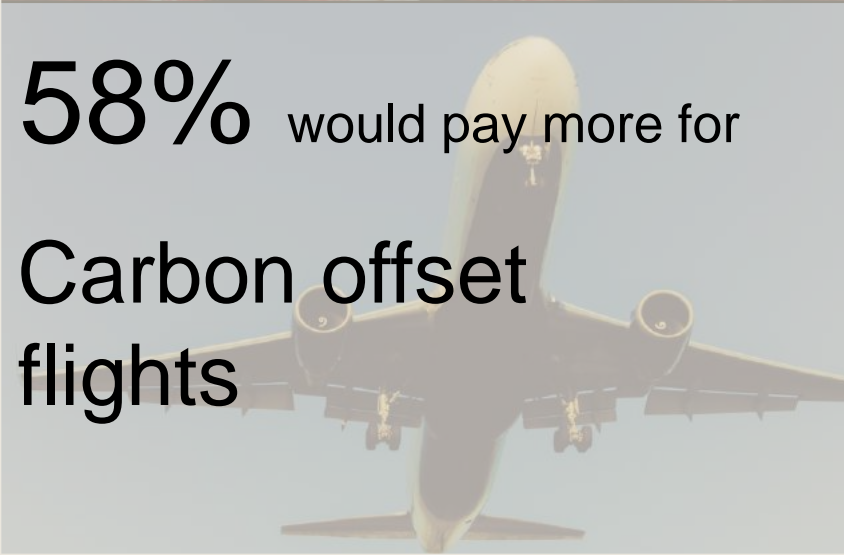
**58%** would pay more for  
Locally grown  
produce



**57%** would pay more for  
Electric cars



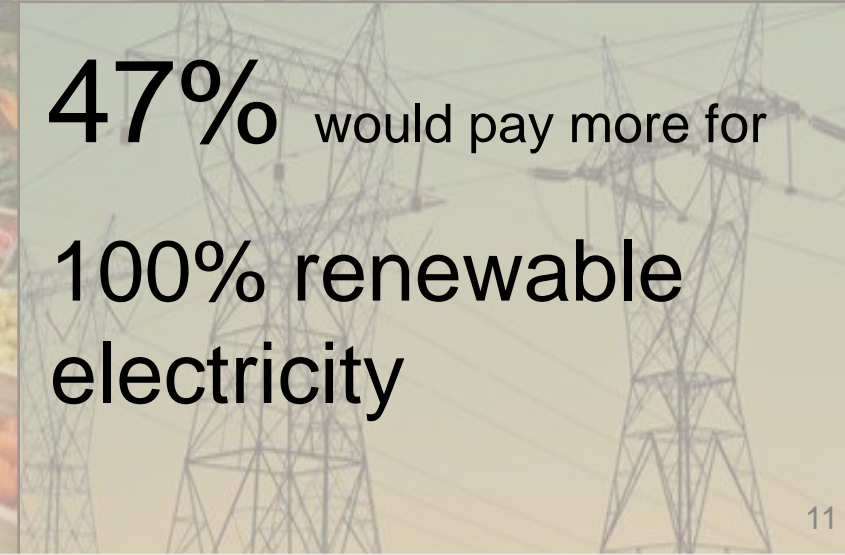
**55%** would pay more for  
Recycled  
clothing



**58%** would pay more for  
Carbon offset  
flights



**32%** would pay more for  
Unpackaged foods  
with shorter shelf  
lives



**47%** would pay more for  
100% renewable  
electricity

# Contact us to find out more

This report includes some highlights from our study, but we have plenty more we are keen to share, just get in touch to find out more

## More findings to share on

- > Willingness to pay, how much consumers are willing to pay for greener products
- > Which brands and sectors are viewed positively and negatively
- > Who consumers expect to take responsibility: themselves, companies, or governments



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# THANK YOU!

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