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CONSULTING

# Consumer Environmentalism Report

(originally commissioned by National Grid)

From Mintel Consulting  
May 2024



# Design and methodology

<b>Fieldwork:</b>	March 2024
<b>Research type:</b>	U&A study (usage and attitudes)
<b>Methodology:</b>	Online quantitative
<b>Market:</b>	GB
<b>Sample size:</b>	2,000 (Plus 300 ASTI region booster)
<b>Target sample:</b>	Internet users aged 16+
<b>Length of interview:</b>	15 mins



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# Key Take Outs

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# Consumer Environmentalism

Climate change remains the UK's top environmental concern, driven by consistent media coverage, though consumers in certain regions have heightened concerns based on local impact

Q4: Which of the following do you believe are the most important environmental issues for the UK?

Climate change

51%

Plastic waste

49%

59%  
Scotland

Water pollution

41%

51%  
North  
East

Air pollution

30%

48%  
Inner &  
Greater  
London

Over-reliance on fossil fuels

24%

# Consumer Environmentalism

**46%**

I try hard to minimise my impact, but will sometimes compromise if it's more expensive/inconvenient

**47%**  
Wave 4

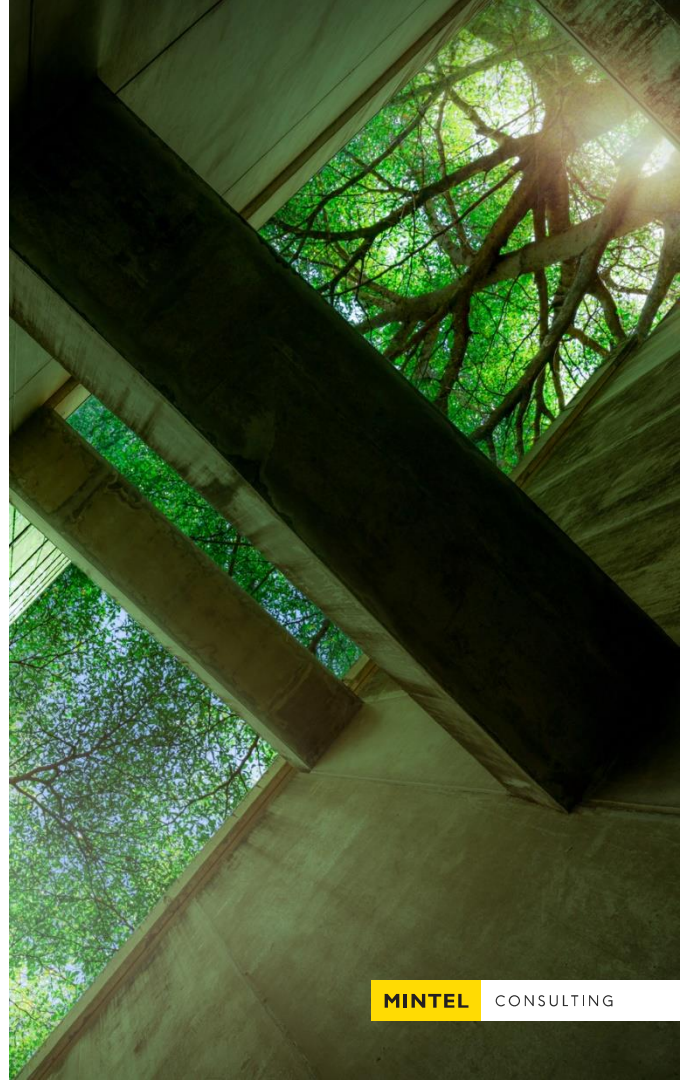
**48%**  
Wave 3

Committed environmentalists do not waiver, but rising costs push others towards cost-neutral sustainability choices

Financial pressures are driving an increase in cost-neutral sustainable behaviours, especially among older demographics

**52%**

Of over 45s have changed their behaviour to save energy in their household (vs 42% 16-44)



# Net Zero

Despite media prevalence, one-third of UK adults still unaware of Net Zero

Q7a: How much do you know about the UK government's plans to reach Net Zero by 2050?

Know a lot

14%

Know a little

54%

Don't know anything

24%

8%

Haven't heard of Net Zero

53%

UK adults include a reduced overall environmental impact among its benefits

22%

Main benefits are focused on the supply aspects of energy security

79%

cite at least one broader UK-centric benefit of the UK reaching Net Zero

Reduced overall environmental impact and energy security are cited among the main benefits of achieving Net Zero, but there is scope to emphasise its broader economic benefits

# Energy Infrastructure Upgrade

People identify a range of important goals for the upgrade works to achieve; but the most important is that they help to prevent bills from getting too high

93%

cite preventing bills from getting too high as important

While people see there are a wide range of factors that can help lower energy bills, few currently see the upgrading and building of new infrastructure as the main route to reduced household bills

36%

Short term Overall positive impact

58%

Long term Overall positive impact

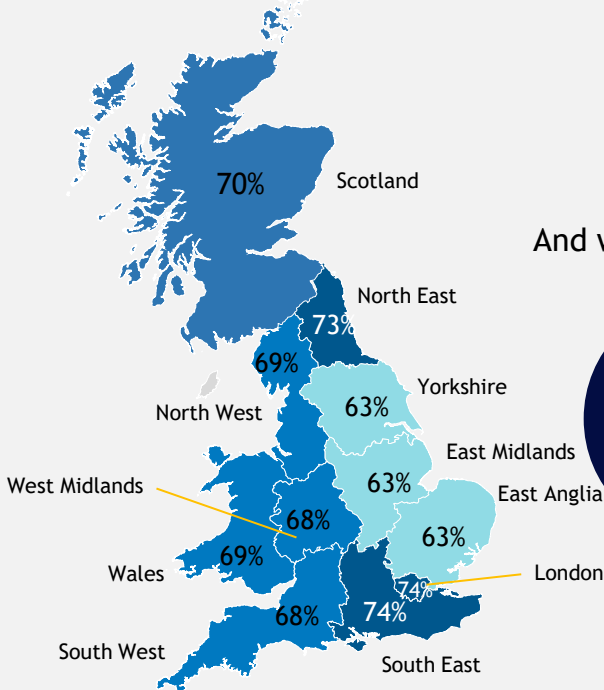
However, consumers are relatively unsure of how the upgrade works will impact their bills - particularly in the short-term

13%

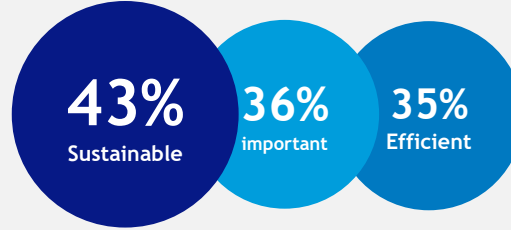
Biggest impact on reduction of energy bills

# Energy Infrastructure Upgrade

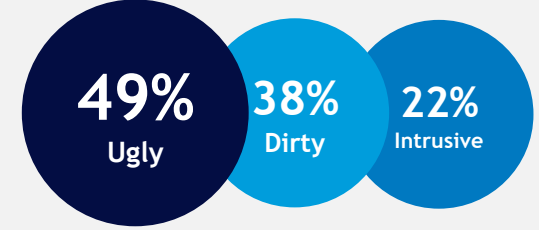
UK adults agree that the building of green energy infrastructure makes them hopeful for the future, particularly in the South East and East where projects are already underway



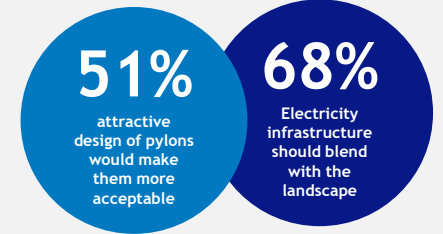
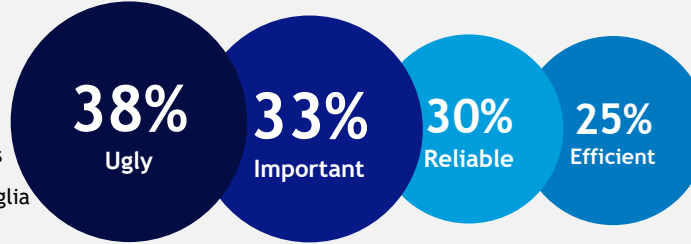
Perceptions of on-shore wind farms and solar farms are similar



In sharp contrast to power station cooling towers



And while there is a greater sense of value and acceptance of electricity pylons, there is a strong desire for infrastructure to have minimal visual impact on the landscape





# Consumer Environmentalism



# Key learnings

## Consumer environmentalism

1

Climate change remains the UK's top environmental concern, but regional concerns vary based on local impacts

2

Energy-saving habits are the most common (and increasing) green household behaviour; albeit this is more likely driven by the cost of living crisis than by a surge in consumer environmentalism

3

People believe in local community action beyond their homes, albeit their actions do not always add up to that

# Climate change remains the UK's top environmental concern, reflecting consistent media coverage in recent years

Q4: Which of the following do you believe are the most important environmental issues for the UK?

Climate change

51%

Plastic waste

49%

Water pollution

41%

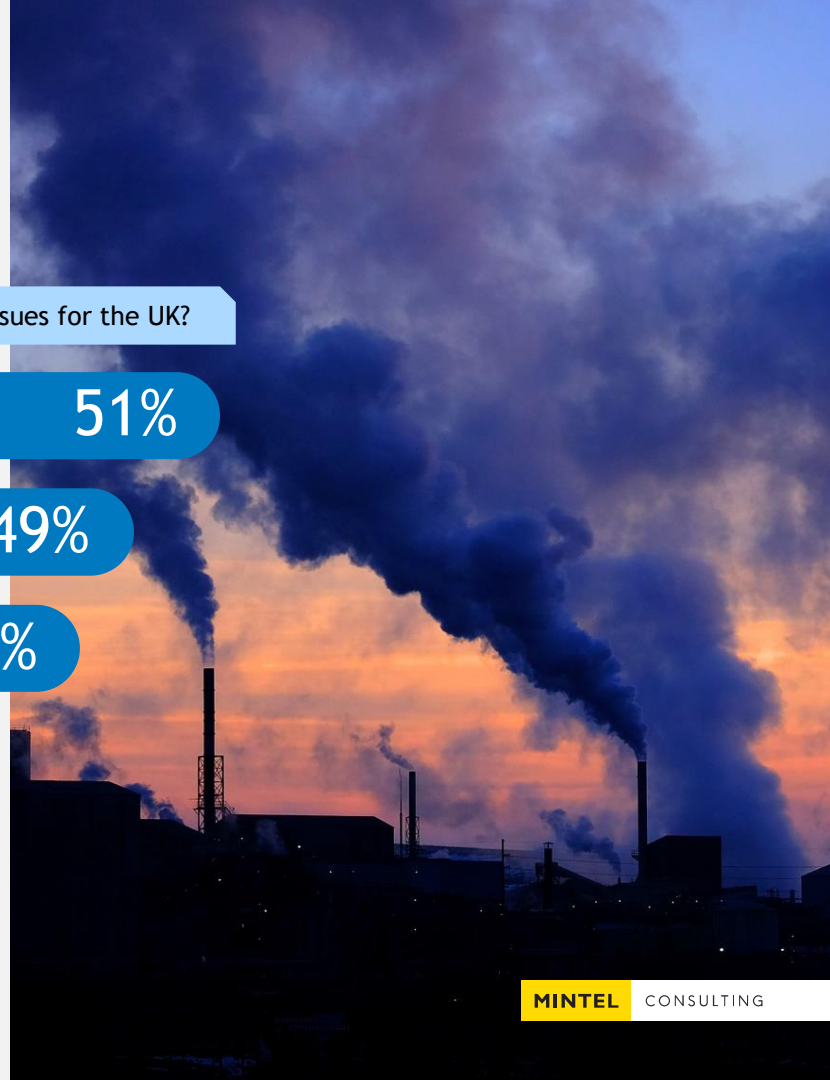
Air pollution

30%

Over-reliance on fossil fuels

24%

Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024



# The impact of localised issues and media focus can also be seen reflected in the data, with different regions prioritising slightly different concerns



## Water pollution

Water companies released record spills of raw sewage into the sea and rivers in England in 2023. There were 3.6 million hours of spills, compared to 1.75 million hours in 2022

Cullercoats Bay was one of 14 places in the UK where the Environment Agency advised people not to swim due to having poor bathing water quality. Northumbrian Water discharged sewage from four storm overflows close to four of the county's most popular beaches

*Bucks Free Press*

51%

North  
East

41%  
UK



## Plastic pollution

Scotland has become the first part of the UK to implement a ban on many of the most problematic single-use plastics. Every year, hundreds of millions are wasted, with many of them littering beaches, waters and parks

SNP and Green ministers have been accused of "failure in delivery" of environmental aims after it was revealed almost 6,500 tonnes of plastic packaging waste has been shipped overseas over the last four years

*The Herald*

59%

Scotland

49%  
UK



## Air pollution

Sadiq Khan has hailed what he said was remarkable progress in improving London's air quality, after a study showed roadside pollutant levels falling faster in the city than elsewhere in the UK

Much of the benefit has come from the Ulez, but improvements have also come from initiatives such as more electric and hybrid buses, and the wider shift towards electric or less-polluting private vehicles.

*The Guardian*

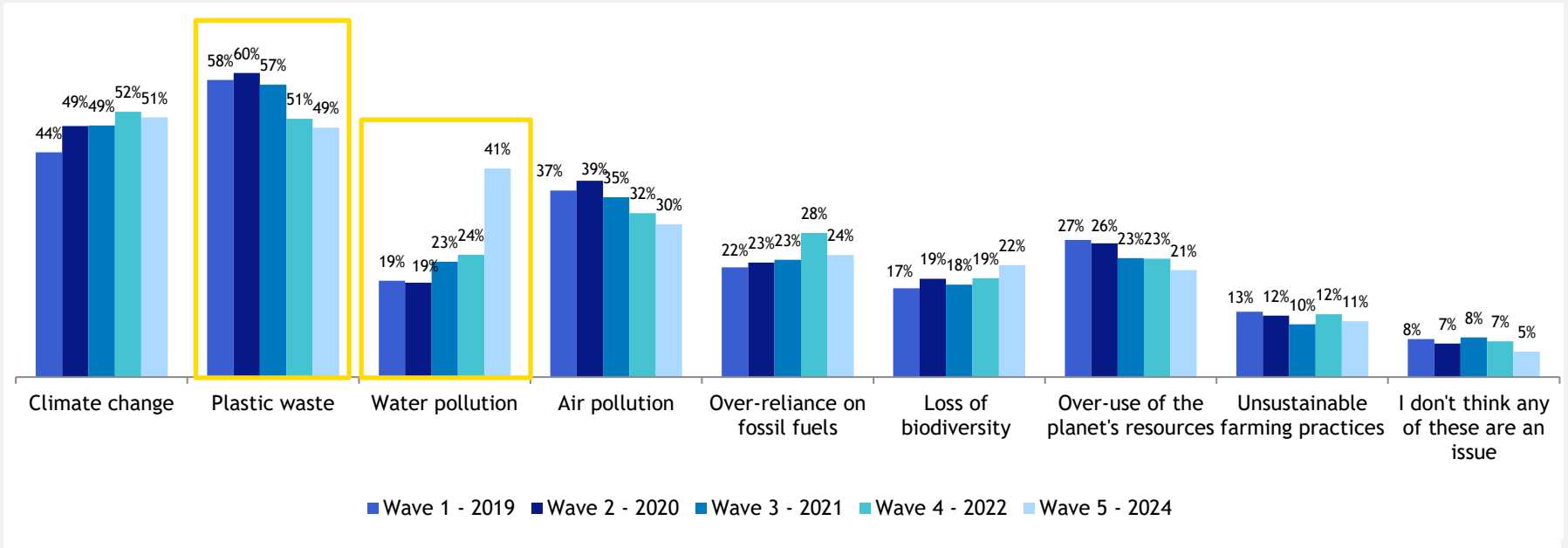
48%

Inner &  
Greater  
London

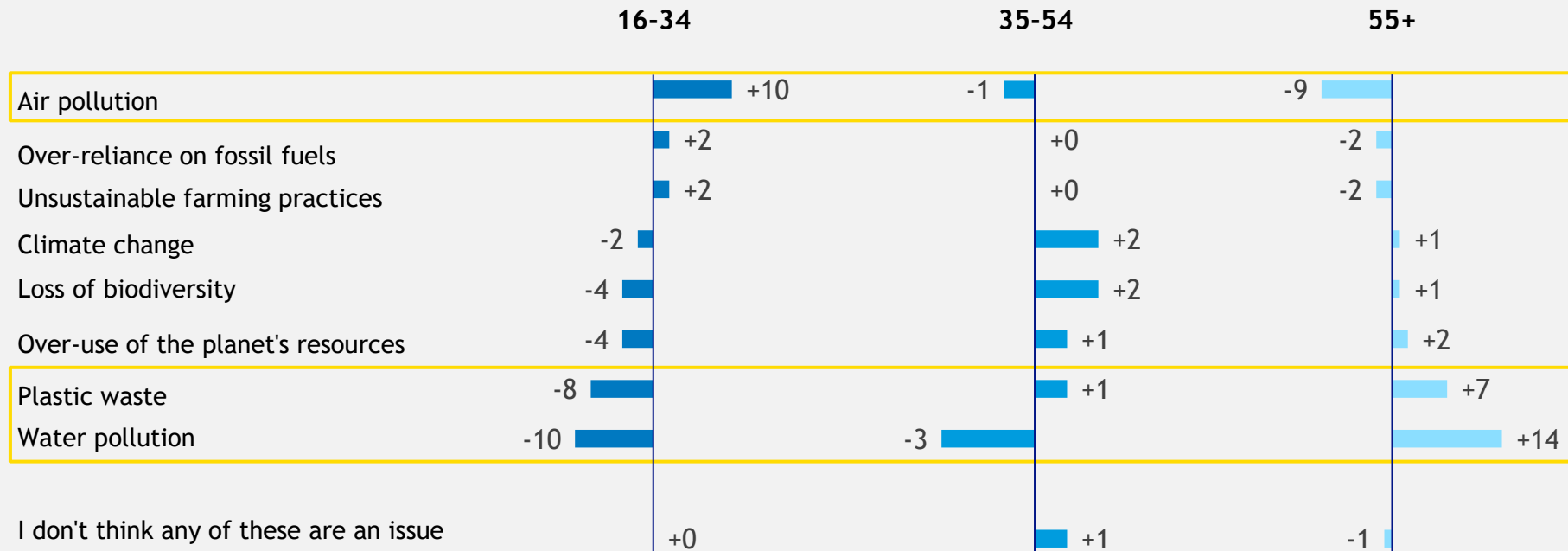
30%  
UK

# While climate change is a consistent concern, it is clear that media focus has shaped other areas of consumer environmental anxiety over time; with the biggest shifts seen for water and air pollution

Q4: Which of the following do you believe are the most important environmental issues for the UK? Select up to 3

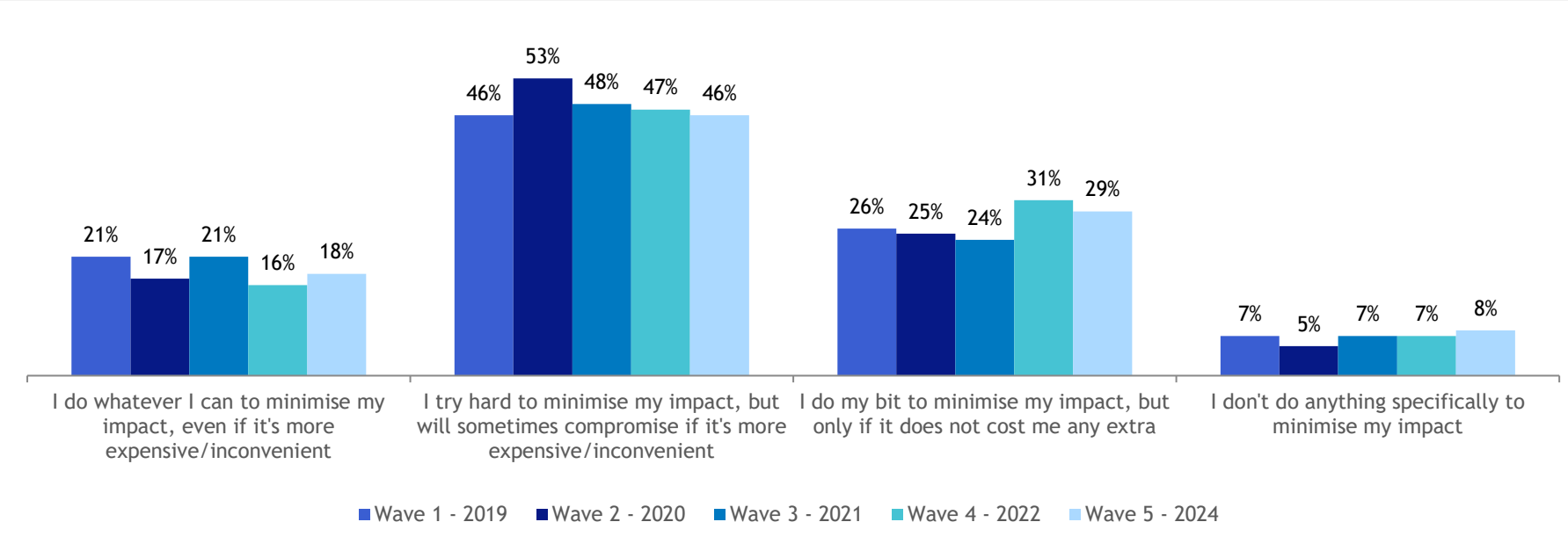


# Younger consumers are significantly more likely to be concerned by air pollution, largely reflecting their greater proliferation in urban areas; while older consumers exhibit higher concerns about plastic waste and water pollution



# Cost of living crisis: committed environmentalists do not waiver, but rising costs push others towards cost-neutral sustainability choices

Q1: When it comes to thinking about your impact on the environment, which of the following best describes you? Please select one



Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

# Energy saving habits are the most common green household behaviour

Q3: Which of the following have you done in the last 6 months? Please select all that apply.

Changed my behaviour to save energy in the household

47%

Reduced the amount of waste I produce

44%

Avoided single-use plastic/plastic packaging

40%

Made changes to my clothes buying habits

34%

Reduced the amount I travel

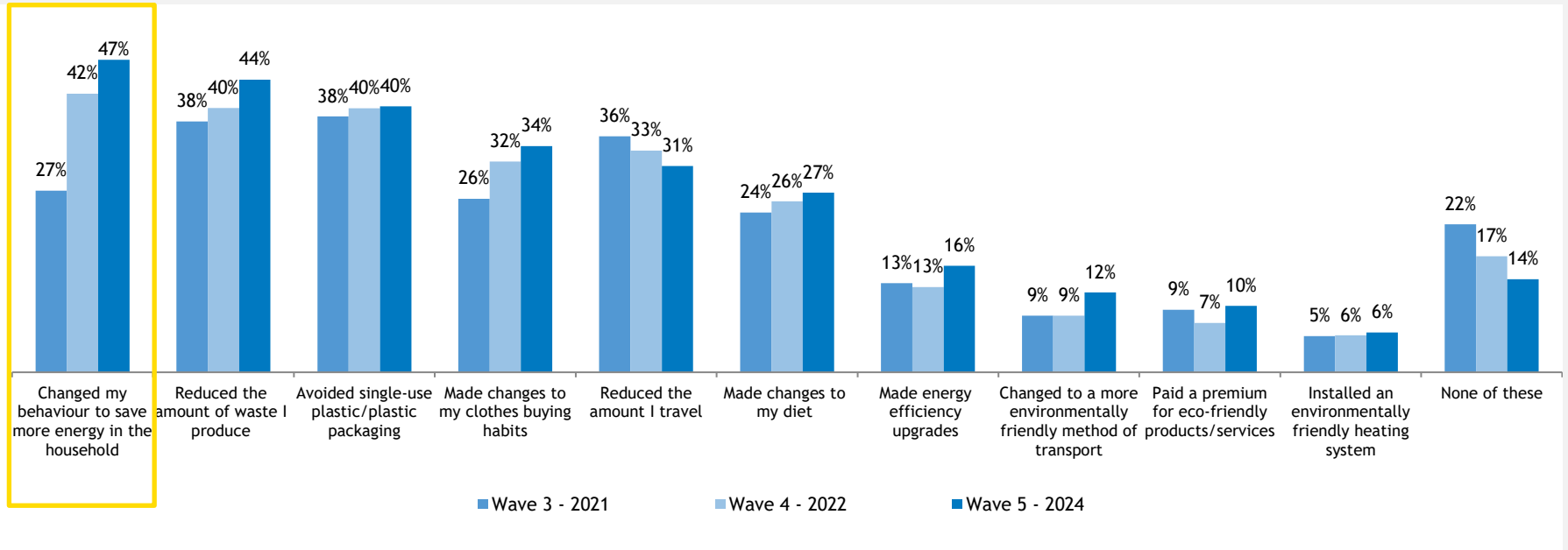
31%





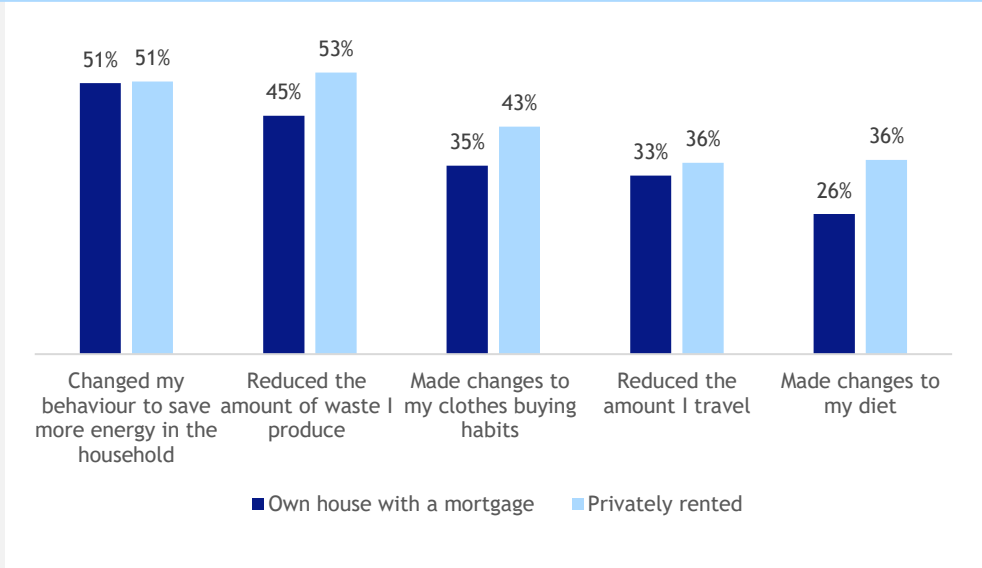
# With energy costs one of the most tangible parts of the cost of living crisis, it follows that energy saving habits have grown the most in recent years...

Q3: Which of the following have you done in the last 6 months? Please select all that apply.



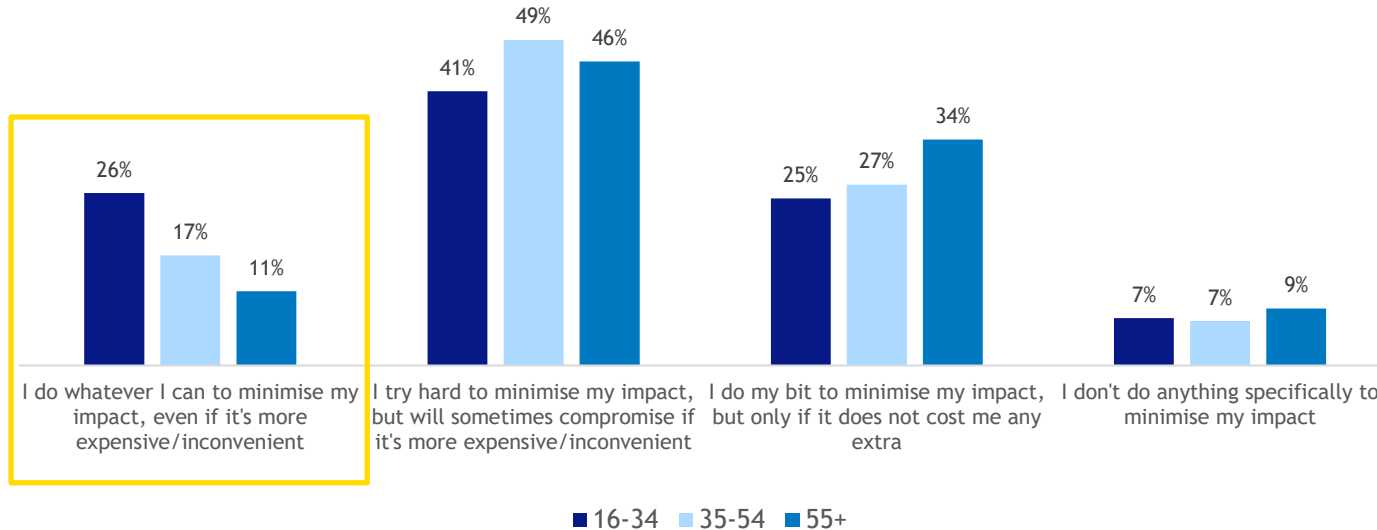
# Renters are notably even more focused on alternative ways to cut spending, reflecting how they may have less control over household energy bills and may have fewer opportunities to bring them down

Q2: Which of the following have you done in the last 6 months? Please select all that apply.



# Younger consumers see themselves as the most likely to go out of their way to protect the environment...

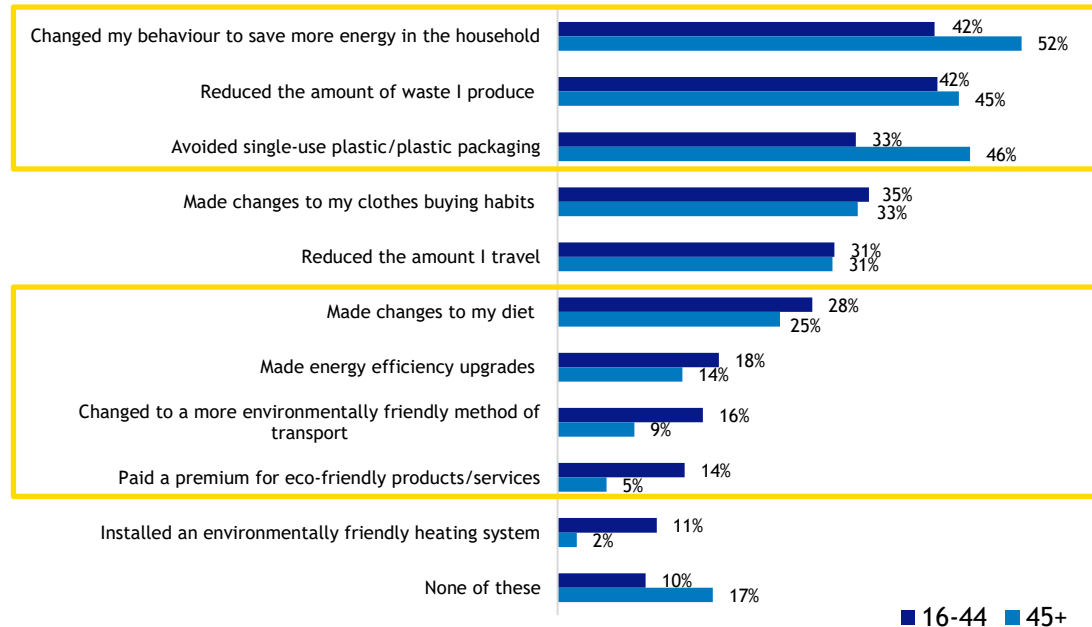
Q1: When it comes to thinking about your impact on the environment, which of the following best describes you? By age



Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

# ... But in reality, there are differences in the behaviours that they see as central to being green

Q3: Which of the following have you done in the last 6 months? Please select all that apply.



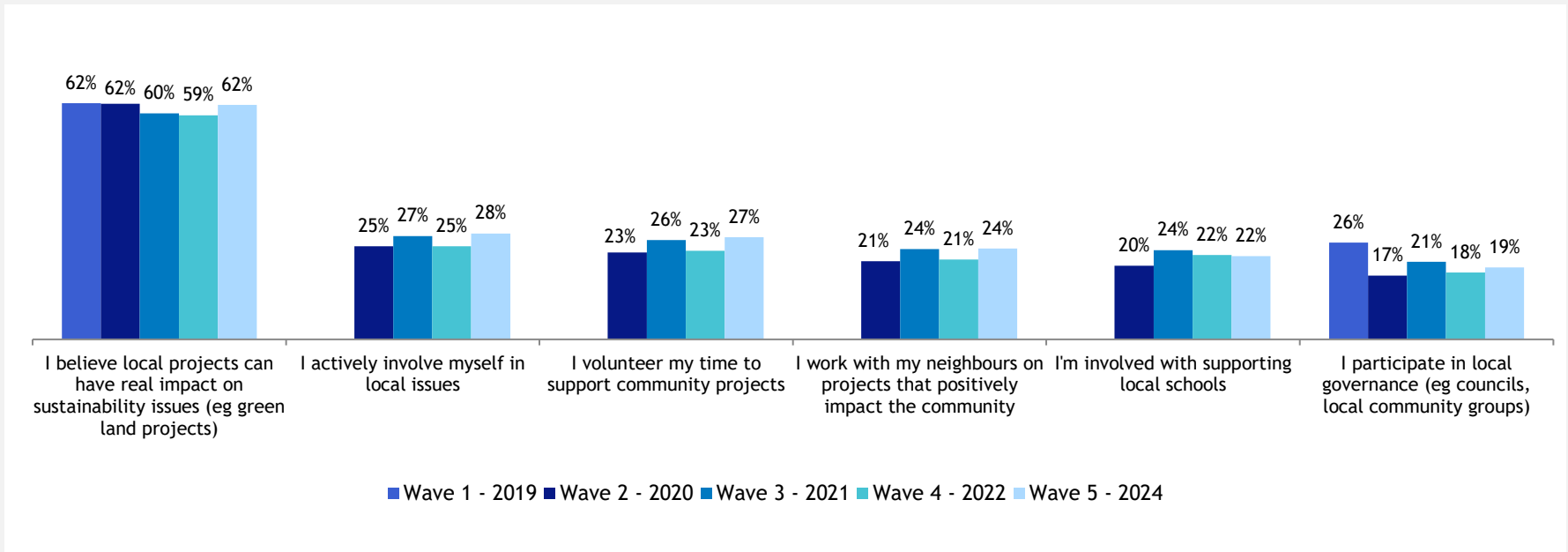
Older consumers (particularly women) tend to adopt more traditional green behaviours, focusing on cutting back or cutting out “problem habits”

By contrast, the young are embracing newer, “bigger picture” lifestyle changes

Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

# Beyond their own homes, people continue to believe that local community action can make a difference, albeit active participation ultimately remains low

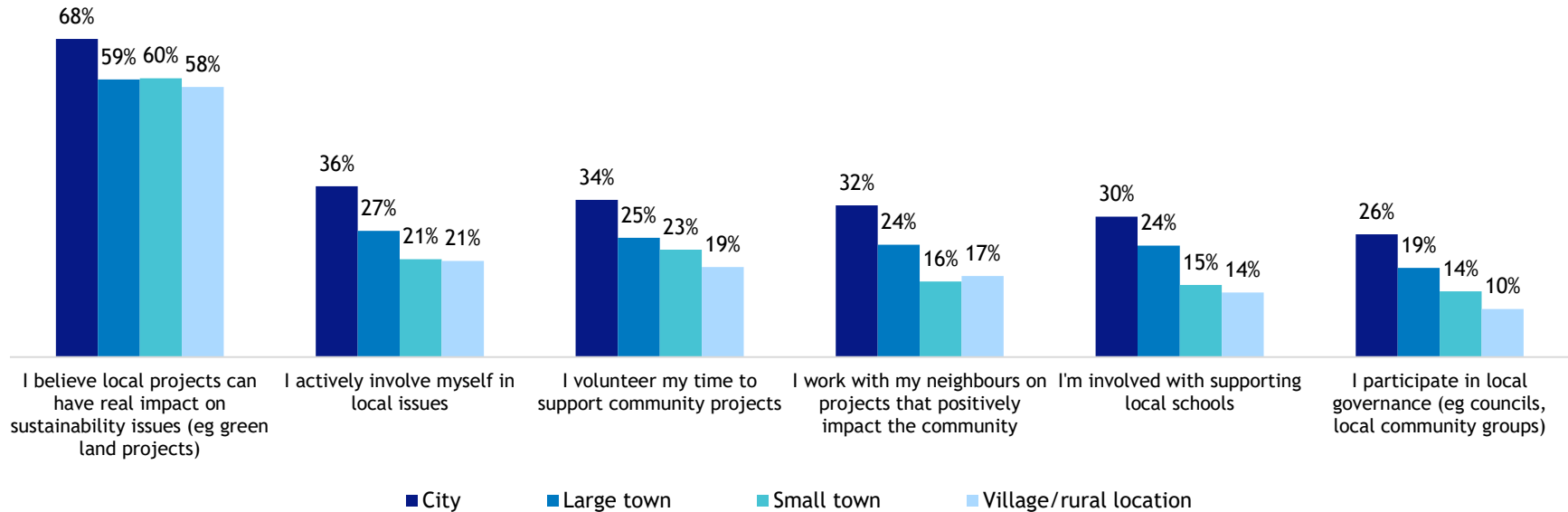
Q2: Do the following apply to you?



Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

# Urbanites are particularly likely to see themselves as community-focused, perhaps reflecting the heightened sense of connectivism in densely populated urban areas, as well as a higher number of shared issues

Q2: Do the following apply to you?



Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024



# Key learnings

Net Zero: awareness, understanding and attitudes key takeaways

1

Although most people have heard of Net Zero, one third of adults either know nothing about it or haven't heard of it, highlighting a gap between the government's policy goals and consumer priorities

2

While many do see the environmental benefits of reaching Net Zero, there is far less clarity around its financial benefits, both on a household and broader economic level

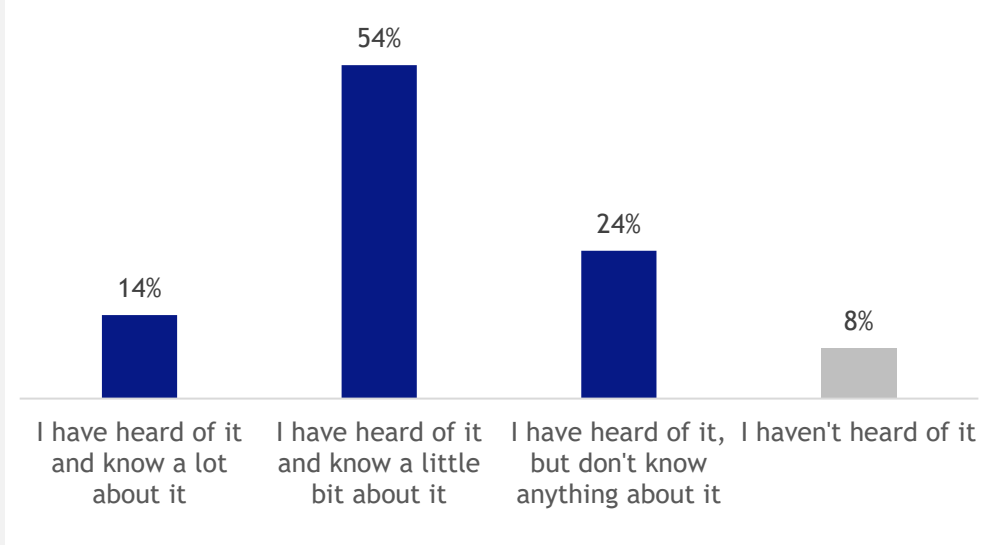
3

As a government policy, it follows that the majority of consumers trust the government to provide reliable information on Net Zero. The energy infrastructure sector has the chance to tap into the wider narrative and emphasise the role that upgrade works are playing



# The vast majority of people have at least heard of Net Zero; but despite its prevalence as a topic in the media, a third of all adults say they either know nothing about it or haven't heard of it at all

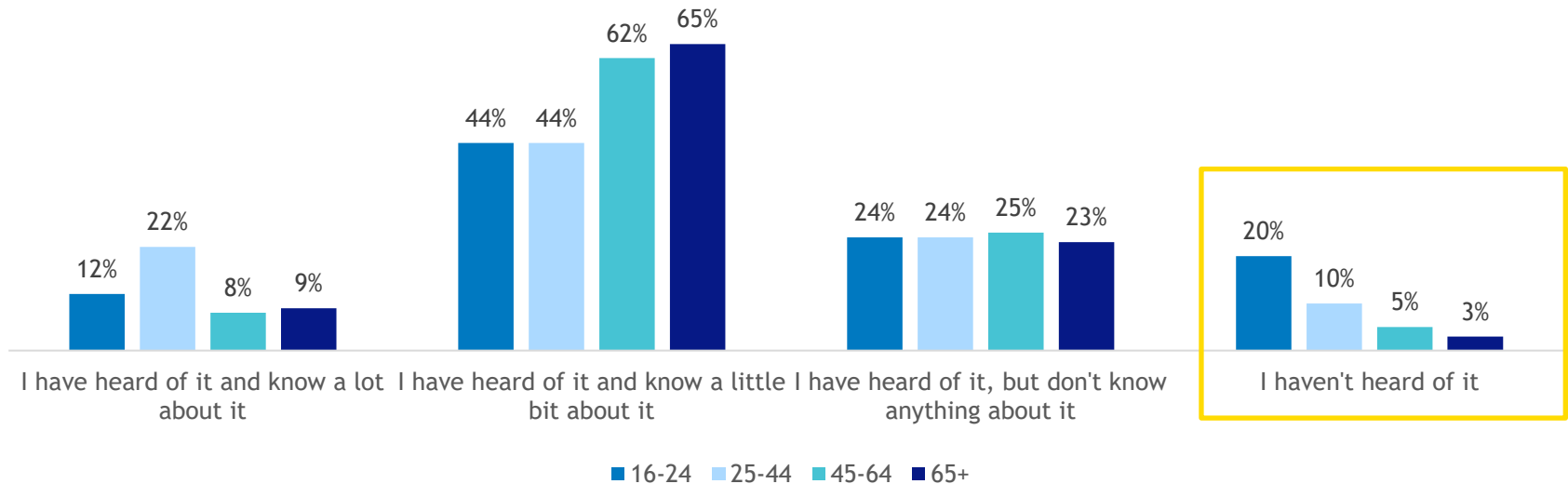
Q7a: How much do you know about the UK government's plans to reach Net Zero by 2050?



# The media often portrays sustainability and environmentalism as defining features of today's youth...

...However, the reality is more nuanced. With one in five 16-24 year-olds unaware of Net Zero, it's evident that more education is needed to inform this generation and the broader population about these plans and their goals.

Q7a: How much do you know about the UK government's plans to reach Net Zero by 2050?



There is also a household affluence gap; some of this is again age-based - reflecting how younger age groups typically earn less. But it also reflects how communication is not reaching nor appealing to less affluent demographic groups

Household incomes of  
£50,000 or over

21%

12%

Household incomes  
under £15,500

4%

Household incomes  
of £50,000 or over

Household incomes  
under £15,500

16%

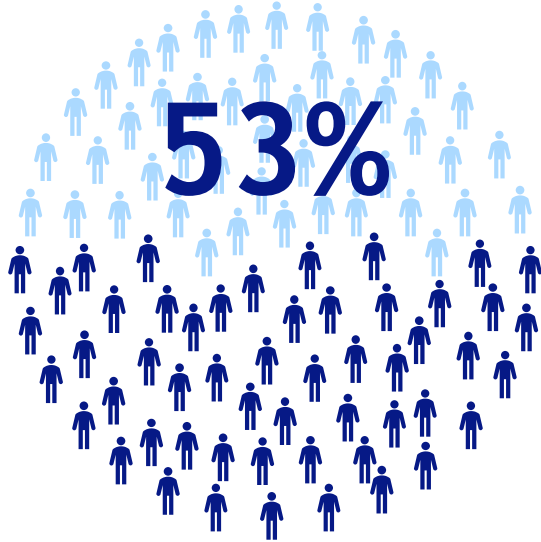


*I've heard of  
it and know a  
lot about it*

*I haven't  
heard of it*



A reduced overall environmental impact is the most commonly cited benefit of the UK reaching Net Zero...



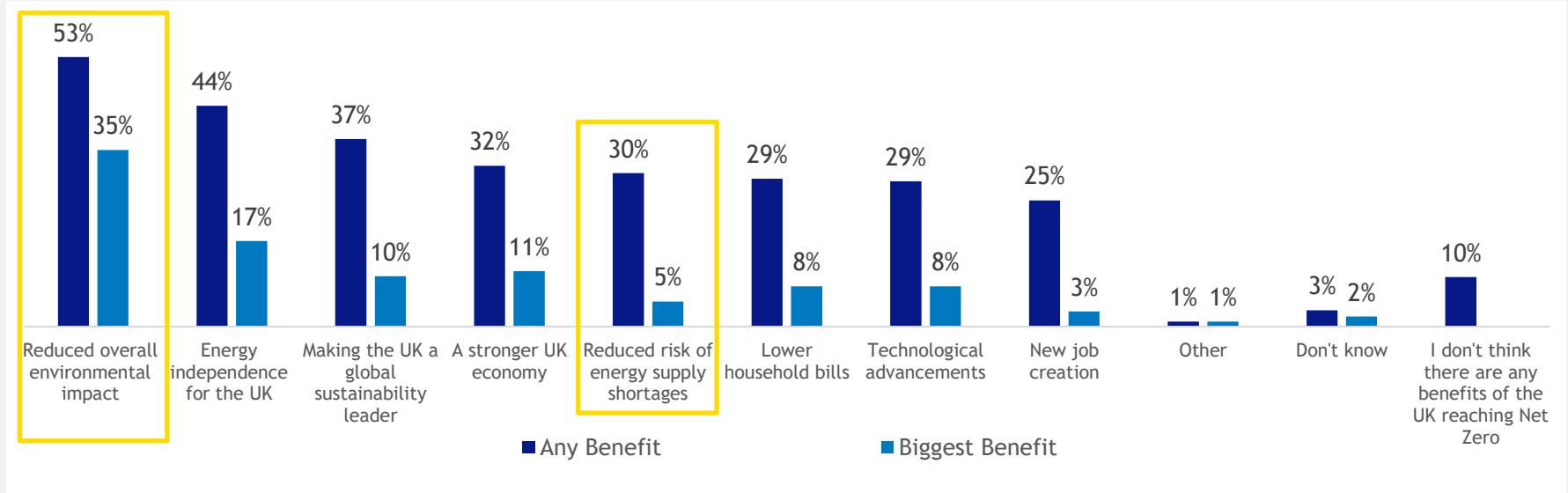
Of UK adults who have heard of Net Zero and at least know a little bit about it include a **reduced overall environmental impact** among its benefits

Base: 1,355 internet users aged 16+ who have heard of Net Zero and at least know a little about it  
Source: Kantar Profiles/Mintel; April 2024

# While a reduced overall environmental impact remains the biggest benefit, reduced risk of energy shortages falls to just 5%, below lower bills and technological advancements

Q7b: Which, if any, of the following do you think will be benefits of the UK reaching Net Zero? Please select all that apply.

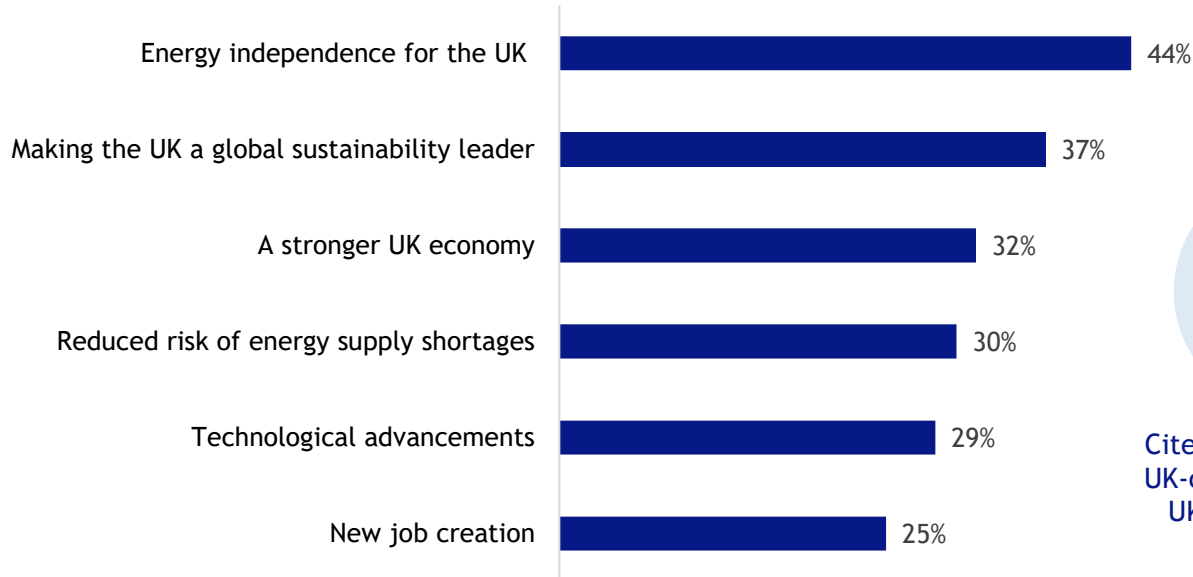
Q7c: And, which one do you think will be the biggest benefit of the UK reaching Net Zero?



Base: 1,355 internet users aged 16+ who have heard of Net Zero and at least know a little about it; 1,178 internet users aged 16+ who have heard of Net Zero and at least know a little about it, and cite at least one benefit  
Source: Kantar Profiles/Mintel; April 2024

# Opportunity to tap into energy security positioning as a route to building engagement with Net Zero

Q7b: Which, if any, of the following do you think will be benefits of the UK reaching Net Zero?

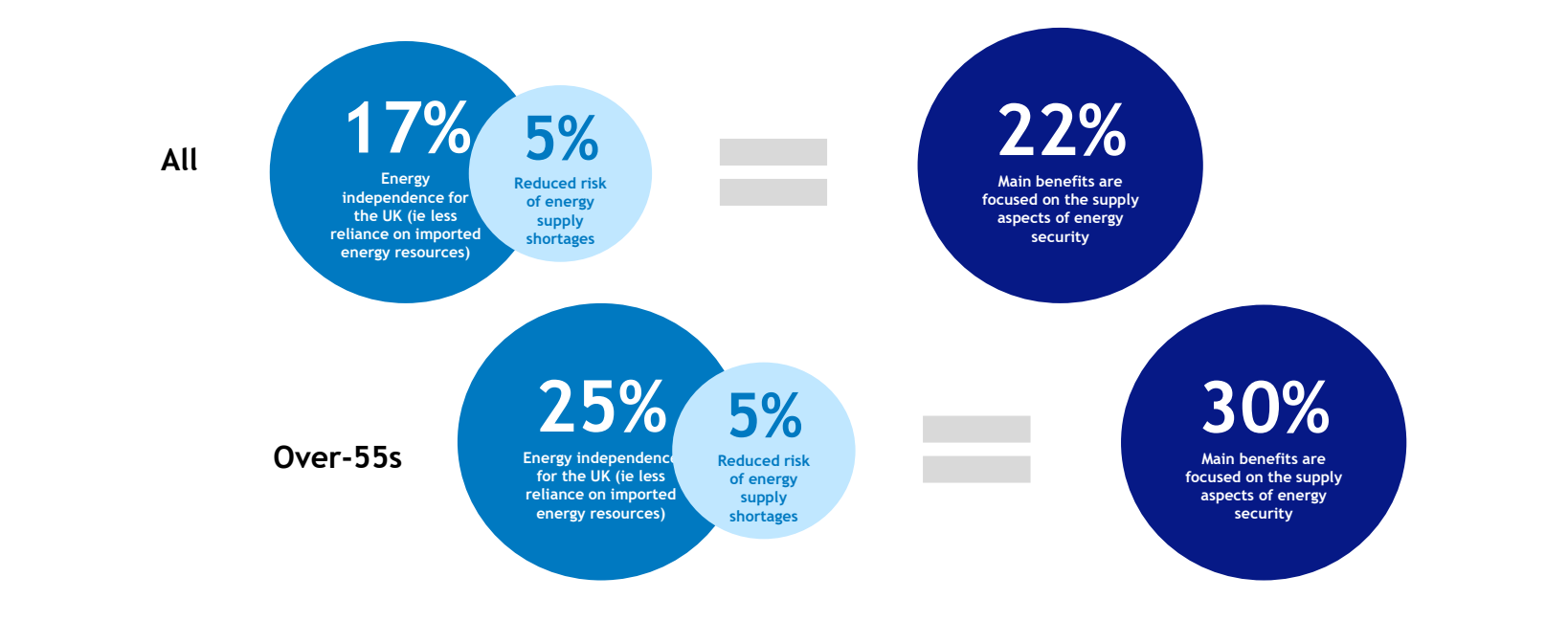


79%

Cite at least one broader UK-centric benefit of the UK reaching Net Zero

Base: 1,355 internet users aged 16+ who have heard of Net Zero and at least know a little about it  
Source: Kantar Profiles/Mintel; April 2024

# Older members of the public are most likely to understand the link between Net Zero and energy security; 30% of over-55s see energy independence and a reduced risk of shortages as the biggest benefits



Base: 1,355 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

# Relatively few members of the public link the goal of achieving Net Zero with reducing household bills

Q7b: Which, if any, of the following do you think will be benefits of the UK reaching Net Zero?

29%

Of UK adults who have heard of Net Zero and at least know a little bit about it include **lower household bills among its benefits...**

8%

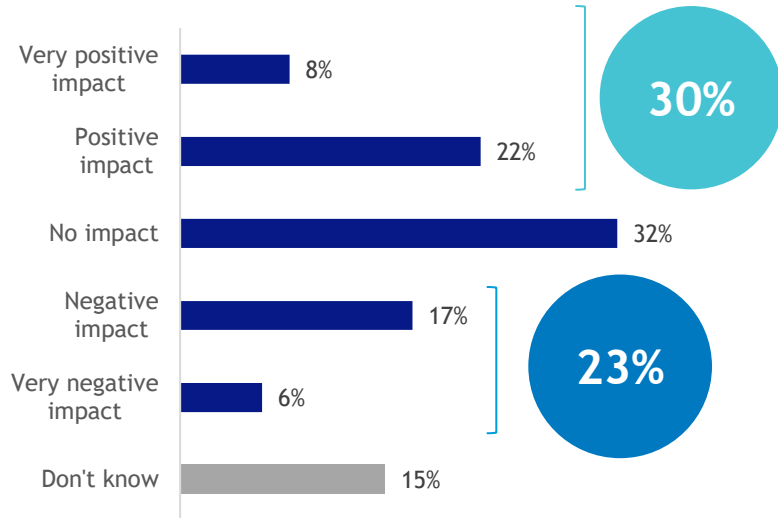
... but just **8%** consider it to be the **single biggest benefit**





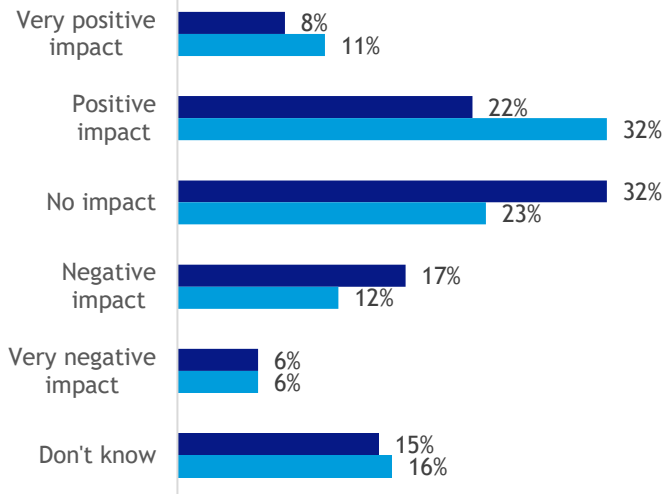
**There is much uncertainty around what Net Zero will mean for personal finances; while many see it as being potentially positive in the short-term, 47% believe it will have no impact or “don’t know”, again underlining the need for more education**

**Q9b: How do you think the UK reaching Net Zero might impact your personal finances in the short term?**



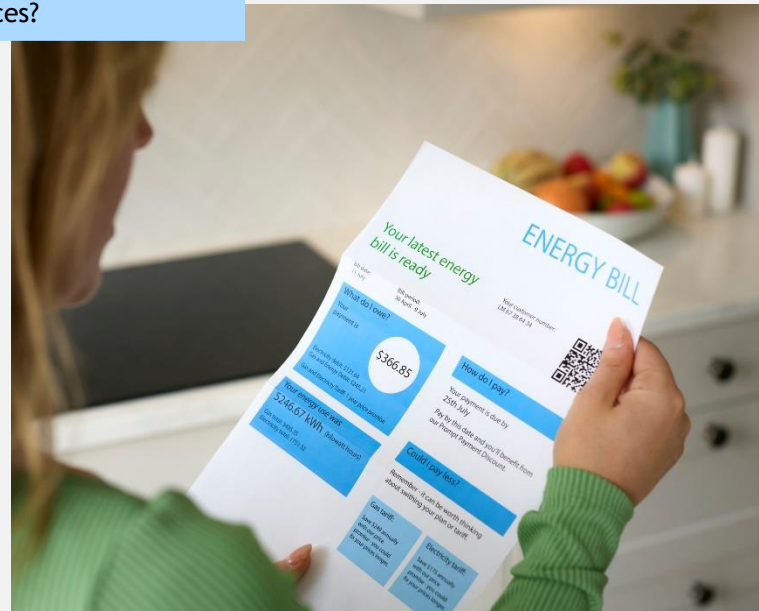
# Longer-term, members of the public are slightly more positive; but many people still don't see that it will benefit their personal finances, underlining a significant opportunity to educate people about this key consumer benefit

Q9b: How do you think the UK reaching Net Zero might impact your personal finances?



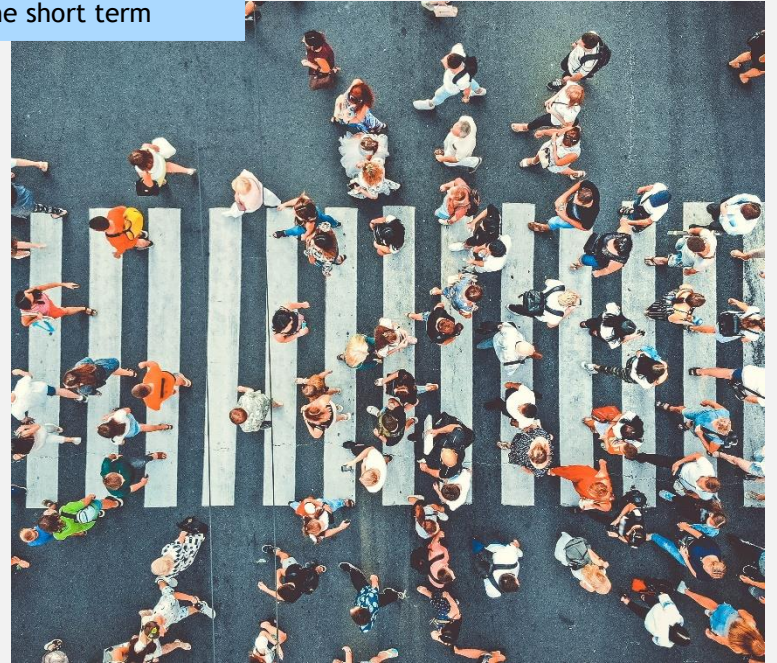
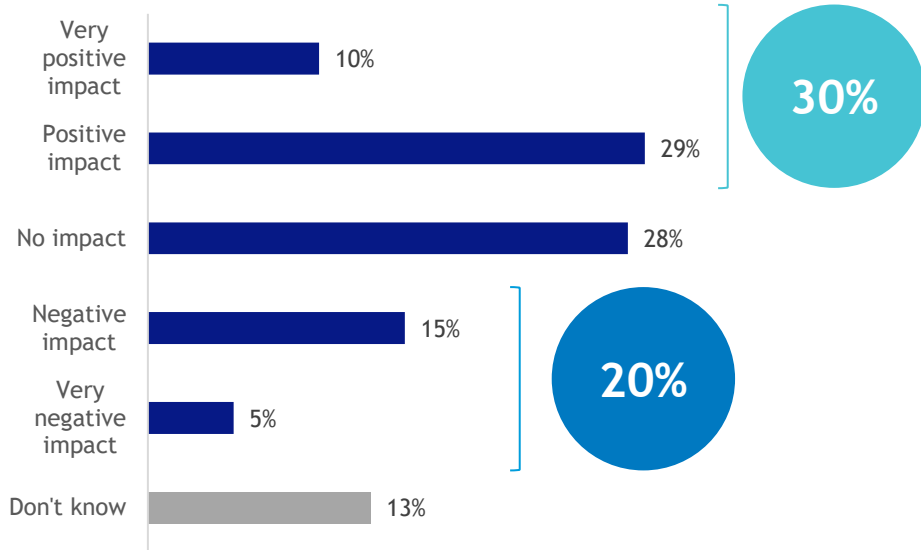
■ ...in the short term (0-5 years)?

■ ...in the long term (beyond 5 years)?



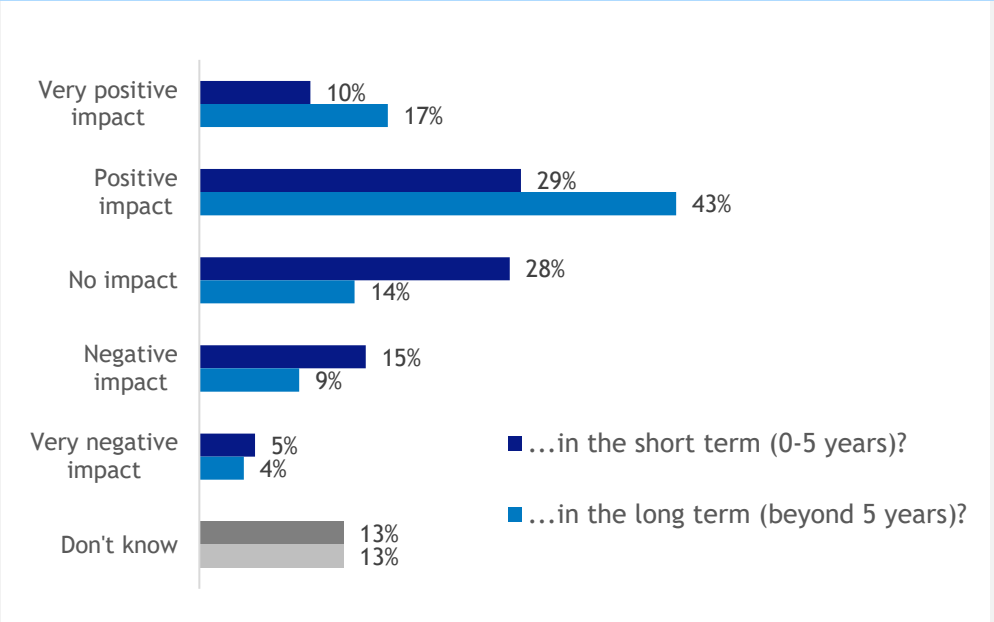
# There is a slightly more positive outlook around what it could mean for the UK's economy as a whole...

Q9: How do you think the UK reaching Net Zero might impact the UK economy in the short term



# 60% of the public exhibit positivity about Net Zero's longer-term impact on the country's economy, largely reflecting how the government has framed it

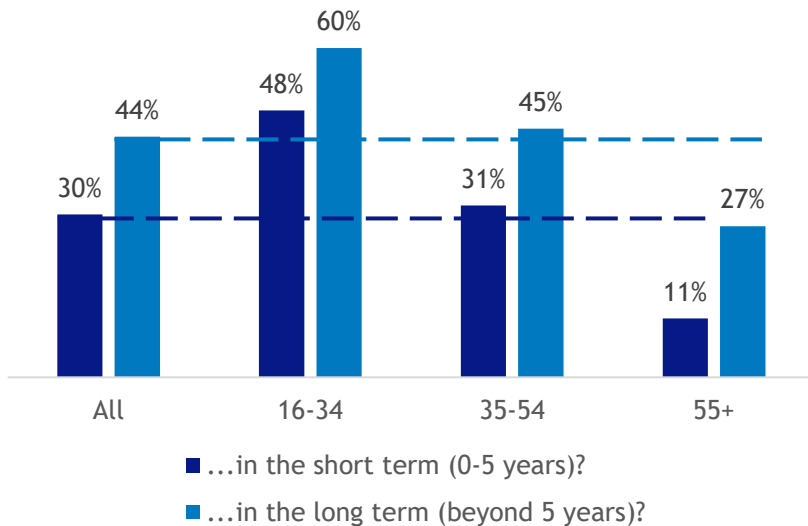
Q9b: How do you think the UK reaching Net Zero might impact the UK economy...



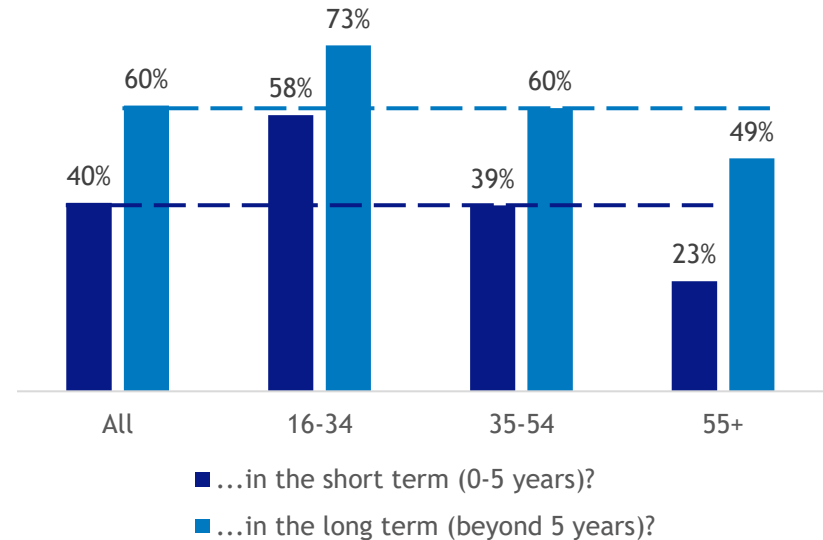
Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

# Younger members of the public are the most positive about the financial benefits of Net Zero, while older members remain sceptical

Q10: How do you think the UK reaching Net Zero might impact your personal finances (eg energy bills, food shopping)... - NET

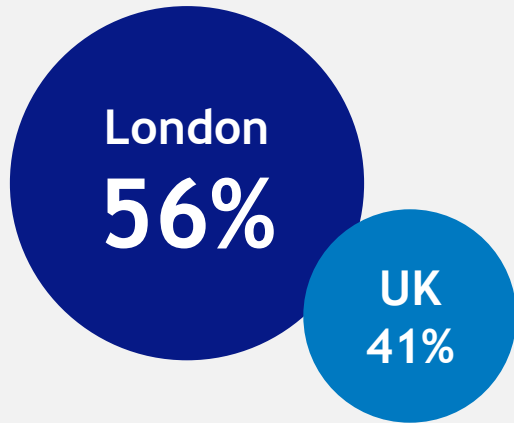


Q9: How do you think the UK reaching Net Zero might impact the UK economy... - NET positive

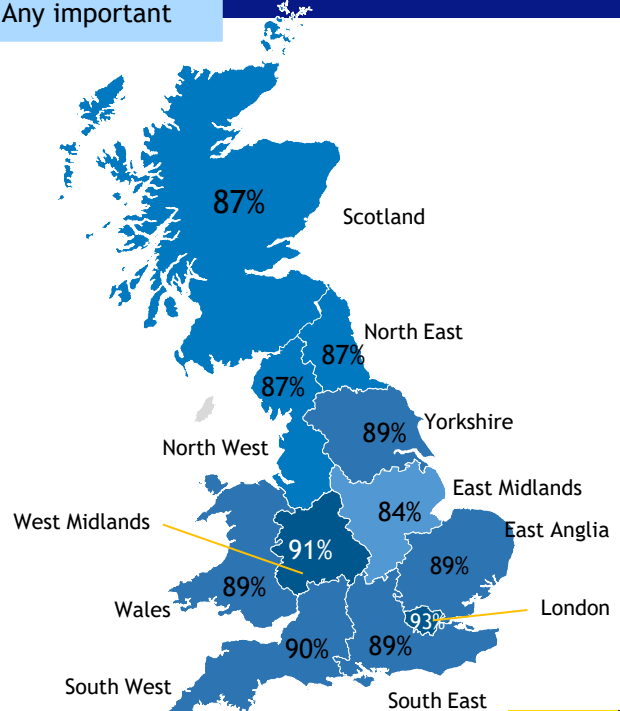


# Despite many not fully understanding what Net Zero entails on a personal and economic level, a national consensus considers it at least somewhat important

Q8a: How important do you consider it to be for the UK to reach Net Zero by 2050? - Any important

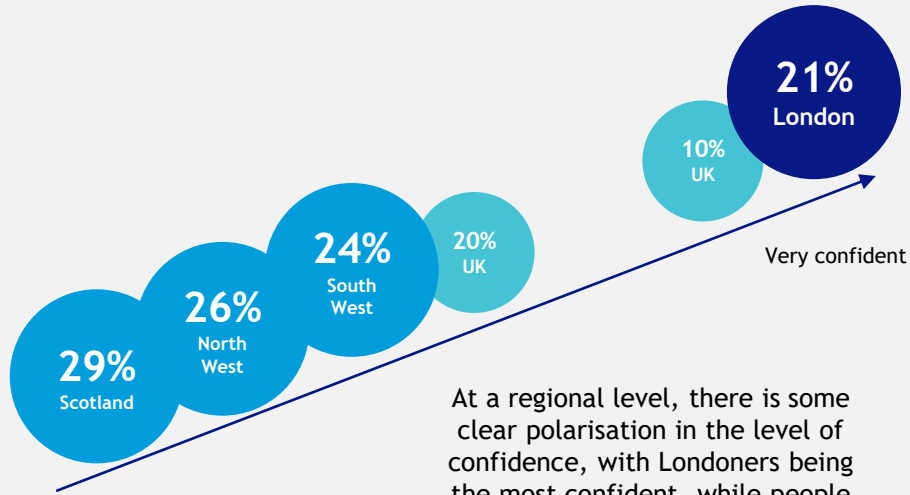


Notably, Londoners deem it very important, compared to the average nationwide, likely reflecting the city's younger demographic.



# However, even though the UK's goal is to achieve Net Zero carbon emissions by 2050 is legally-mandated, public confidence is arguably relatively low

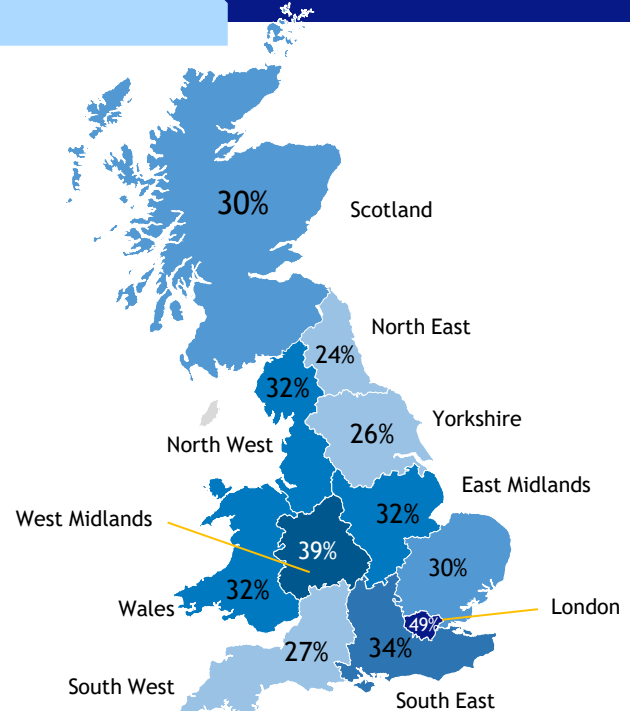
Q8b: And, how confident are you that the UK is on track to reach Net Zero by 2050?



Not at all confident

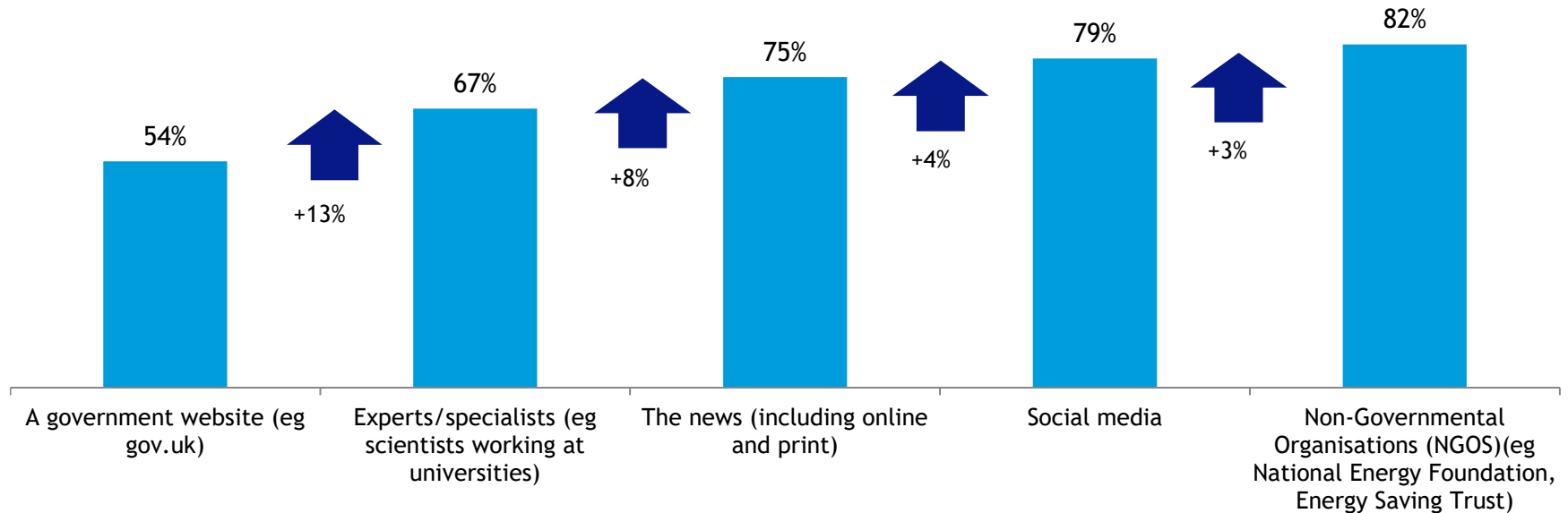
Very confident

At a regional level, there is some clear polarisation in the level of confidence, with Londoners being the most confident, while people living in Scotland, and the North and South West showing a clear lack of confidence in the achievement of Net Zero.



Base: 2,000 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

TURF analysis shows that currently, the top five channels will reach the majority of people to communicate reliable information about Net Zero.





# Upgrade Works; Awareness, Understanding and Perceived Benefits

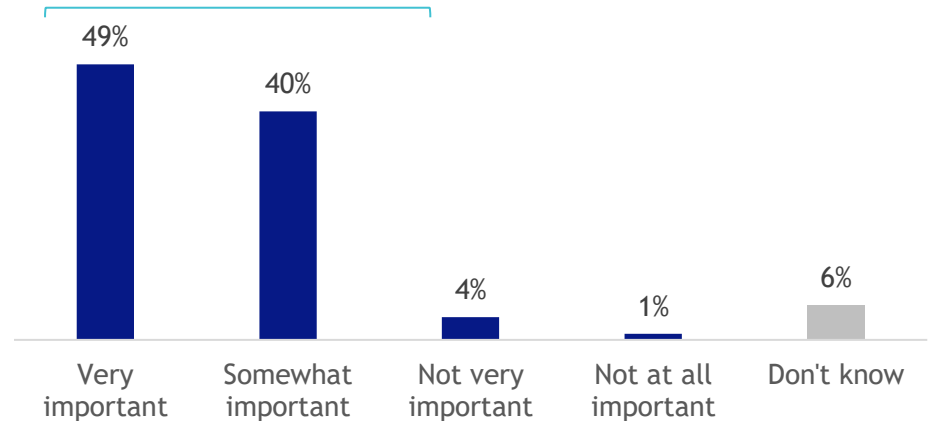


Irrespective of awareness, it is encouraging that the vast majority of people see upgrade works as important; Indeed, half see them as very important.



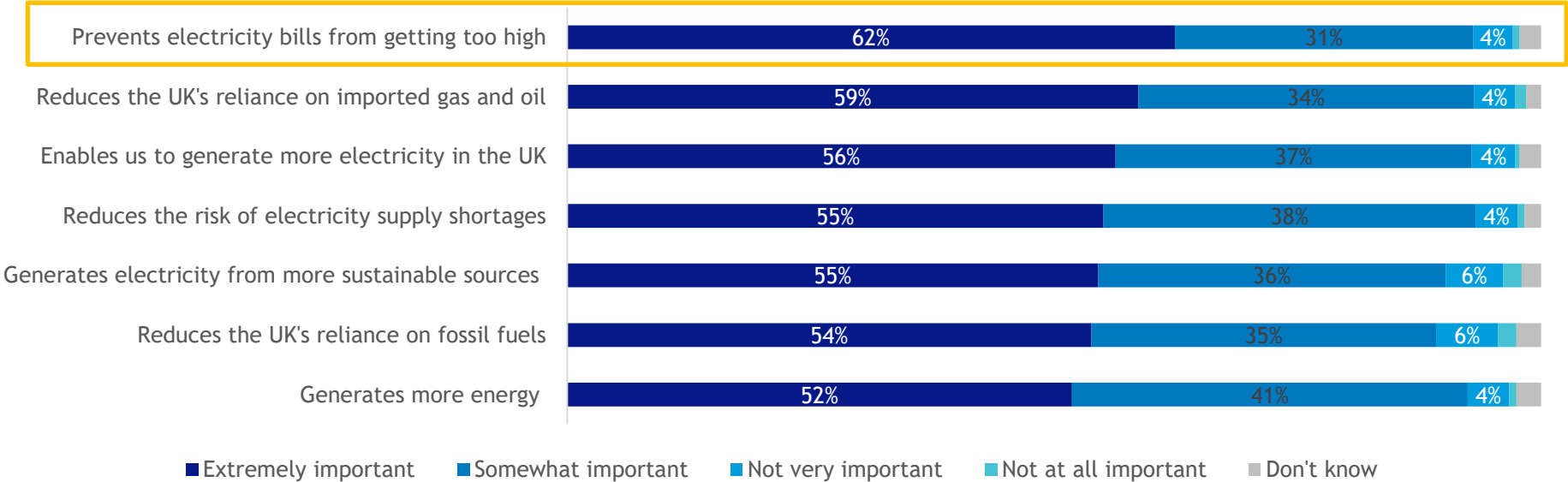
Q15c: And, how important do you think it is to upgrade the UK's electricity network?

89% of all respondents considers upgrade works to be at least somewhat important



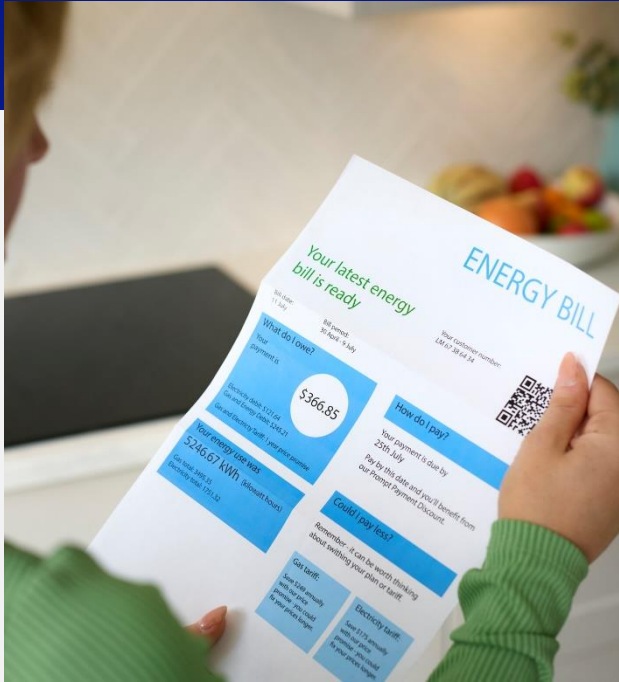
# People identify a range of important goals for upgrade works to achieve; but the most important is that they help to prevent bills from getting too high

Q16: How important do you think it is that the UK's electricity network upgrade achieves each of the following?

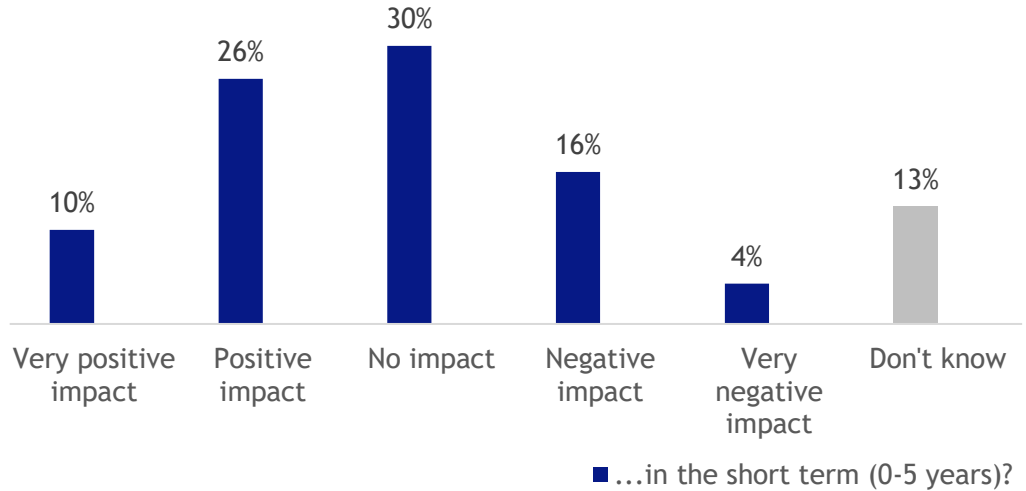


Base: 1,856 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024

Currently, much like their understanding of the impact of reaching Net Zero on energy bills, consumers are relatively unsure of how the upgrade works will impact their bills - particularly in the short-term



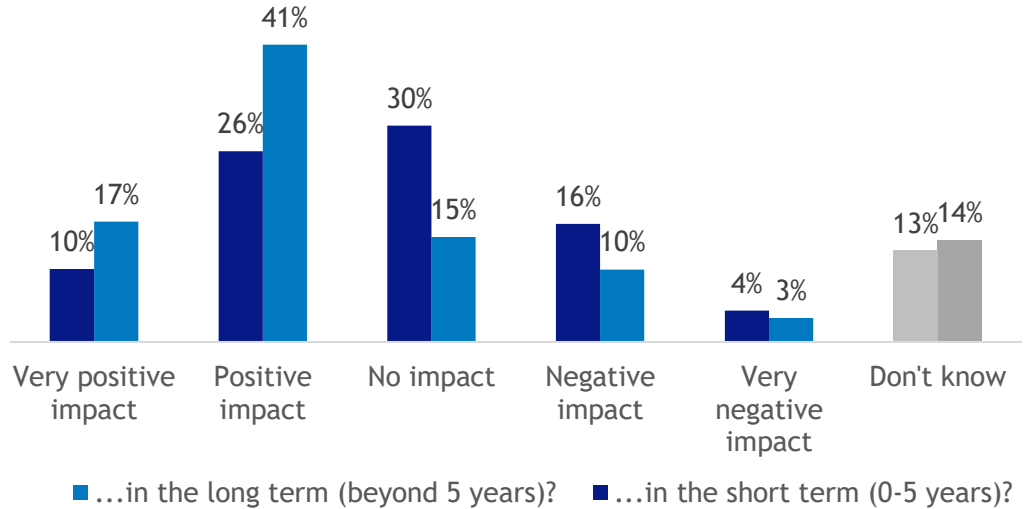
Q17: How do you think upgrading the UK's electricity network might impact your home electricity bills...



# There is a much stronger belief that upgrade works will be positive for bills in the longer term

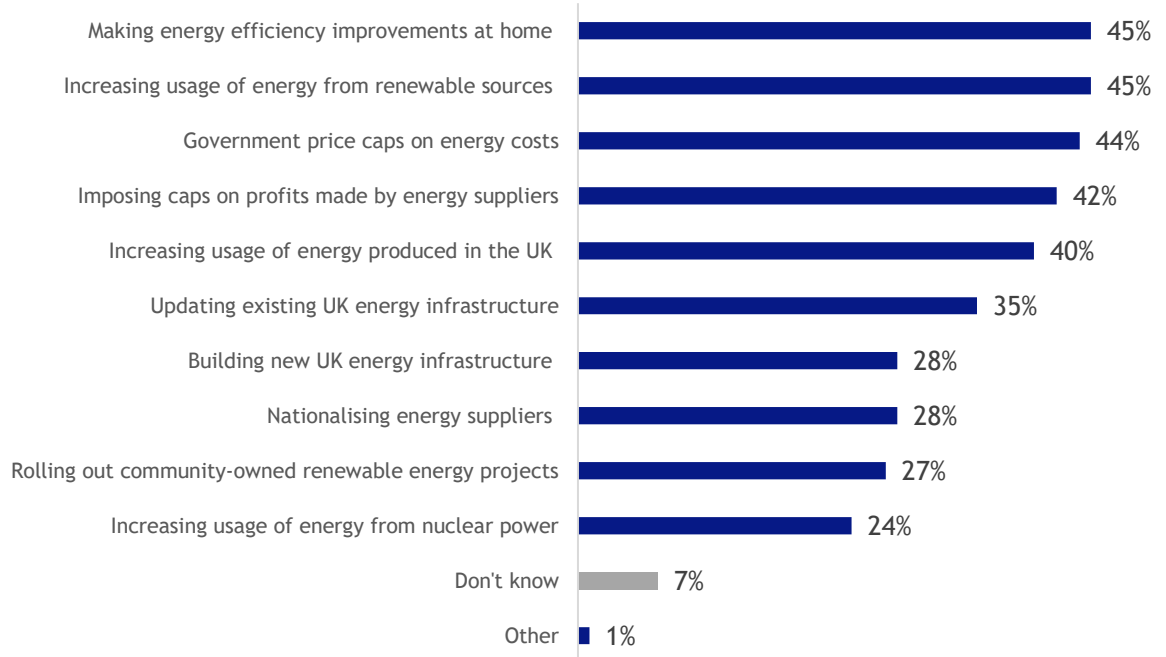


## Q17: How do you think upgrading the UK's electricity network might impact your home electricity bills...

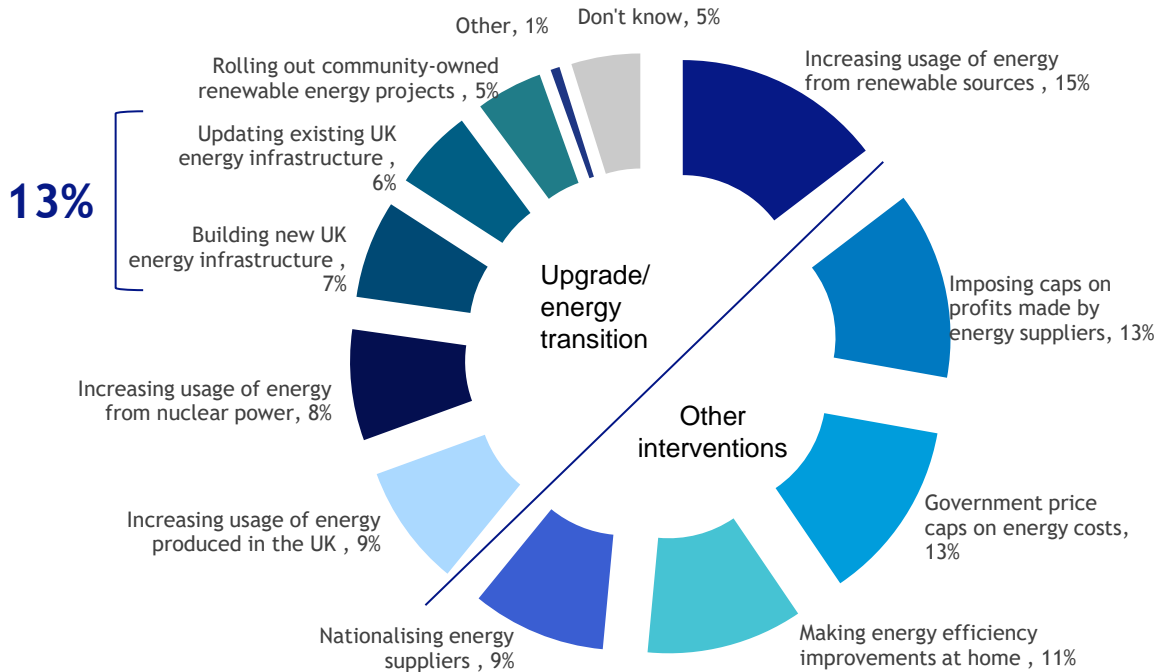


Much of the uncertainty around the extent to which upgrade works can help to lower energy bills stems from the fact that people (quite correctly) see that there are a range of factors that could help to bring down household energy bills...

**Q6a: Thinking broadly about the cost of energy in the UK, which of the following do you think could help reduce energy bills for British households? Please select all that apply.**



**Q6b: And, which one do you think will have the biggest impact on reducing energy bills for British households?**

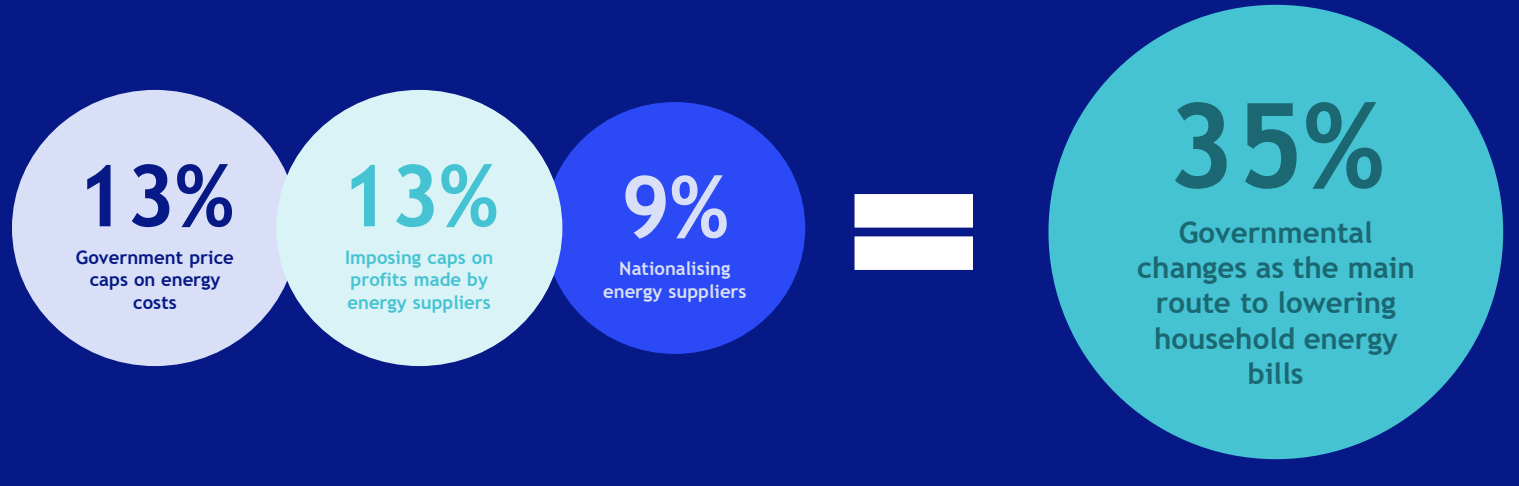


...And, for most, there is little clarity over which of these factors will be most effective

However, currently relatively few see the upgrading and building of new infrastructure as the main route to reduced energy bills, further illustrating the need to better communicate how works will increase efficiency in the network, reduce reliance on imported fossil fuels and thus help to reduce household bills.

A challenge for comms is that collectively, many still believe that government-led interventions are the only real route to reduced energy bills

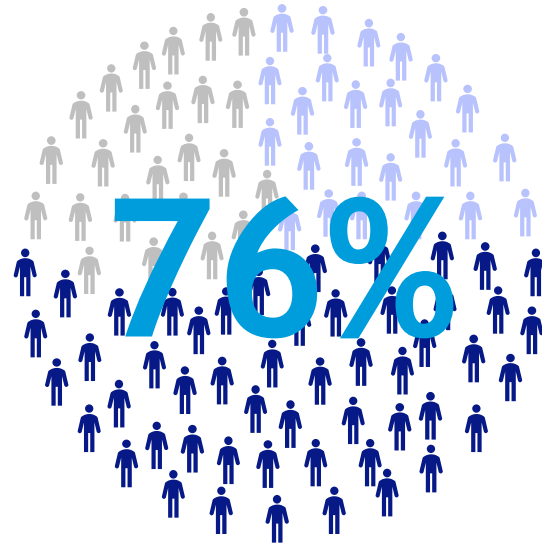
Q6b: And, which one do you think will have the biggest impact on reducing energy bills for British households?



Base: 1,859 internet users aged 16+  
Source: Kantar Profiles/Mintel; April 2024



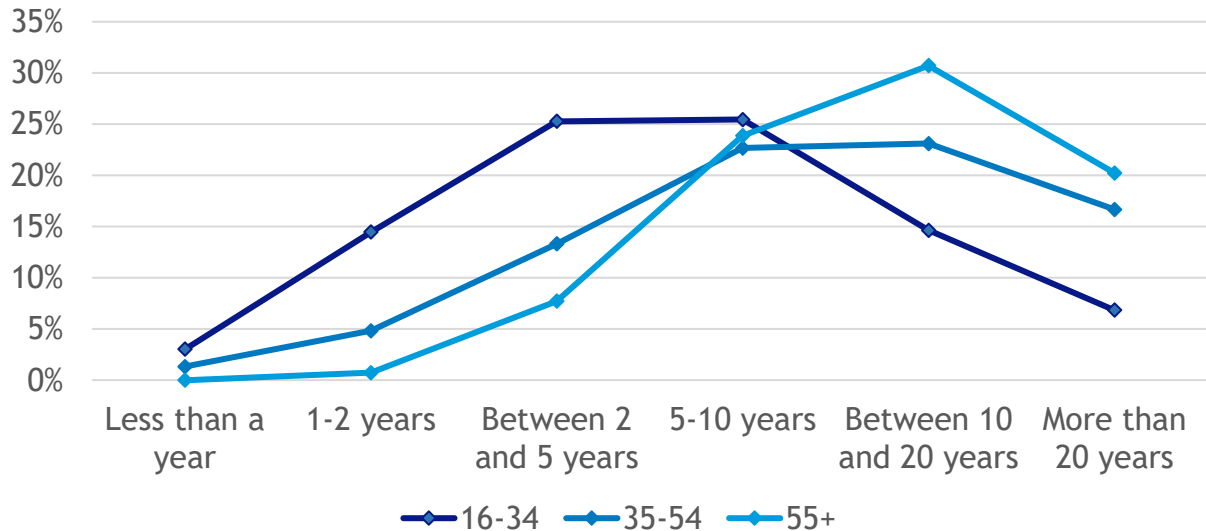
But ultimately, it is encouraging that the majority of consumers believe that the upgrade works are justified if it means more affordable bills in the longer term, and this must therefore be a central tenet of comms



**52%** of all UK adults strongly agree and **24%** agree that disruption during the upgrade works is justified if it means more affordable electricity bills in the longer-term

Far more detail is needed around how long works are expected to take. Currently, the young expect short turnarounds; while at the other extreme, 20% of over-55s believe the work will take more than 20 years

Q15b: How long do you think it will take to upgrade the UK's electricity network?



43%

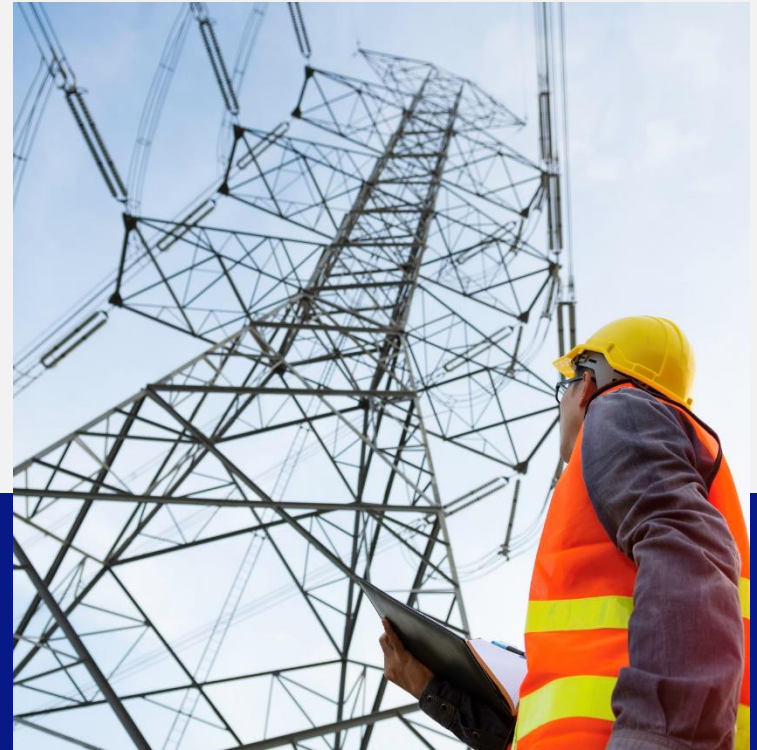
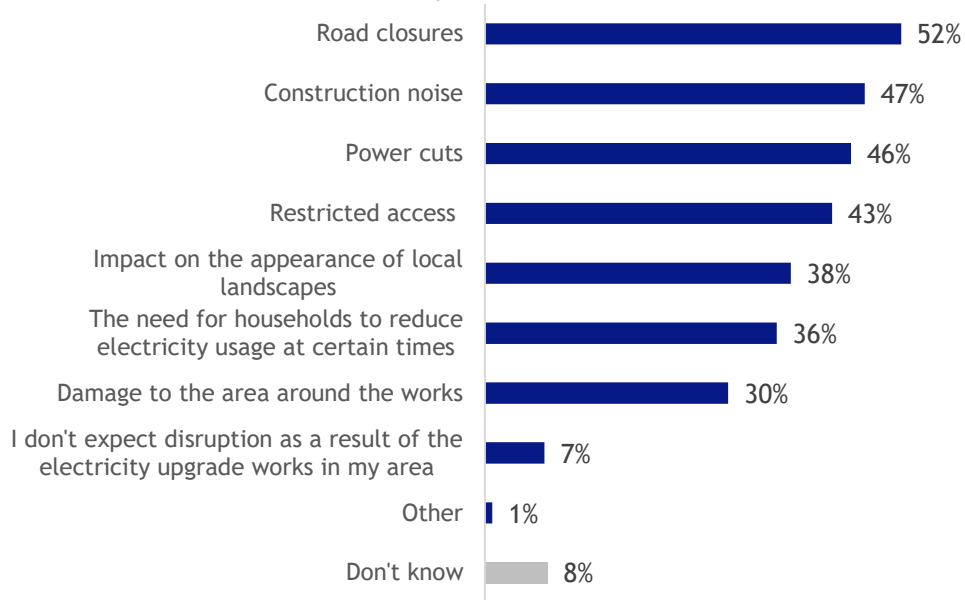
Of 16-34s believe the upgrade works will take less than five years

8%

vs of over-55s

# People widely understand that the works will be disruptive in some way or another; Indeed, just 7% don't expect any disruption in their area

Q18: Which of the following disruptions would you expect to happen as a result of the electricity network upgrade works in your area?



While the most common types of disruption people are expecting relate to local and environmental disruptions, many also see power cuts as a realistic result of the upgrade works



Q18: Which of the following disruptions would you expect to happen as a result of the electricity network upgrade works in your area?

**46%** Power cuts

**36%** The need for households to reduce electricity usage at certain times

# 25% of all respondents are currently signed up to an Energy Management Scheme, but of that, 8% are not actively participating

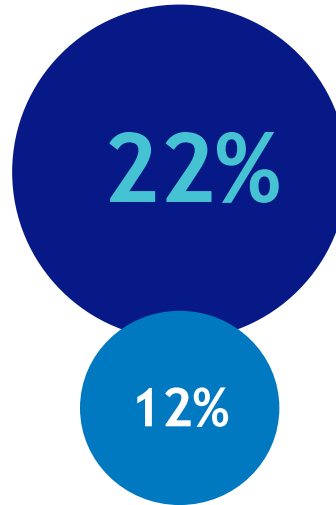
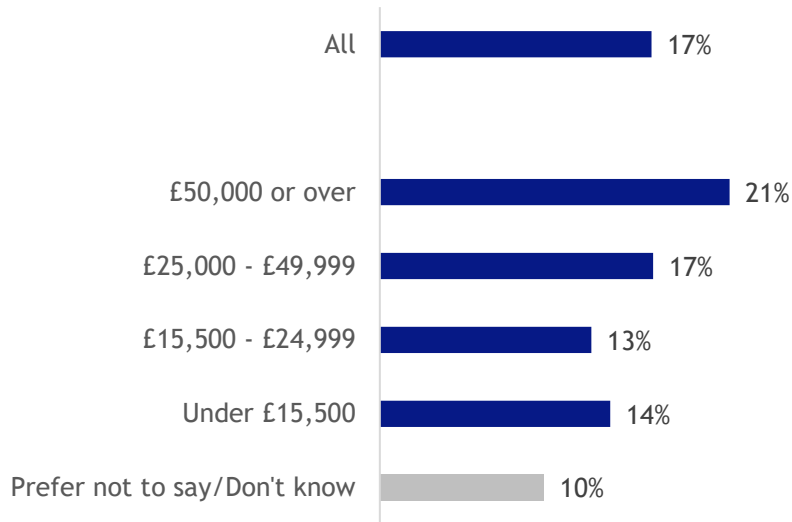
Q21a: Which of the following best describes your participation in electricity management schemes?



Base: 2,000 internet users aged 16+ / Source: Kantar Profiles/Mintel; April 2024

# Age and region do not generally appear to play a determining factor in overall participation, but it is notable that household income and financial health does

## I am signed up and actively participating



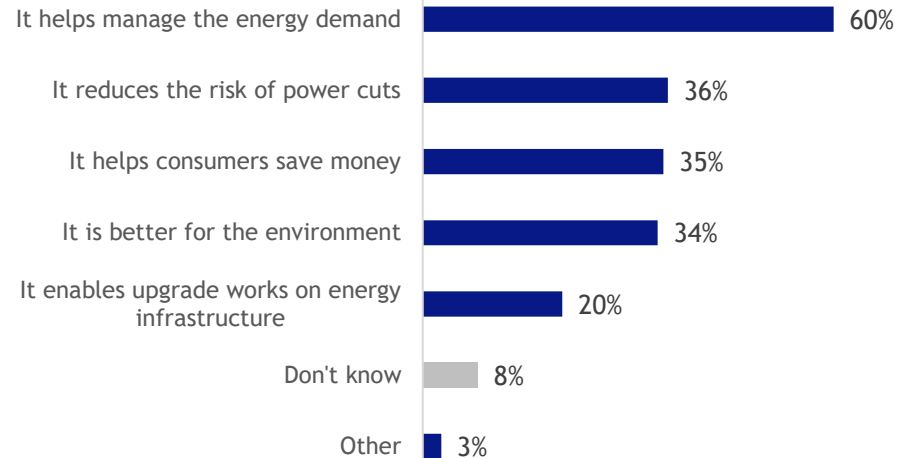
Of respondents who describe their current financial situation as “**Healthy**” are signed up and actively participating in an EMS

Of respondents who describe their current financial situation as “**Struggling/in-trouble**” are signed up and actively participating in an EMS



## Consumers are largely clear in their understanding that energy suppliers are using EMS to help manage energy demands...

Q22: Why do you think energy suppliers want to encourage customers to reduce their electricity usage at certain times? Please select all that apply.



# ... But for active participants, it is undoubtedly financial rewards that are at the heart of their participation

Q21b: Why do you participate in an electricity management scheme? Please select all that apply.

I like the financial rewards

52%

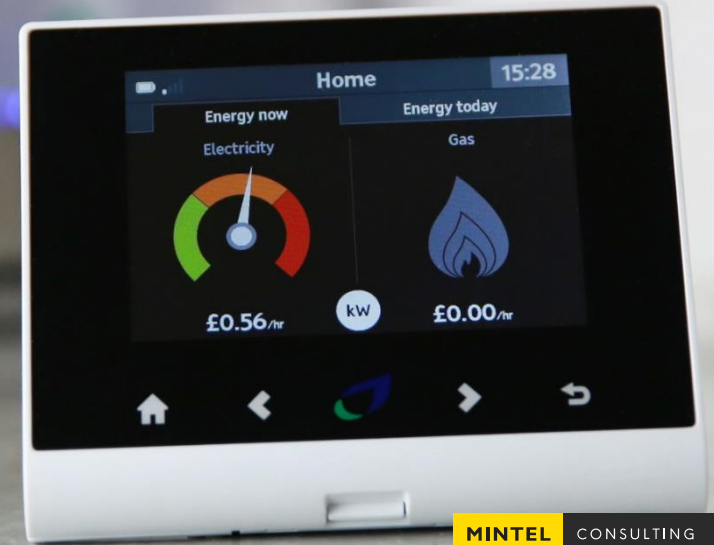
I want to help reduce demands on the electricity grid at peak times

45%

I want to take advantage of off-peak energy rates

43%

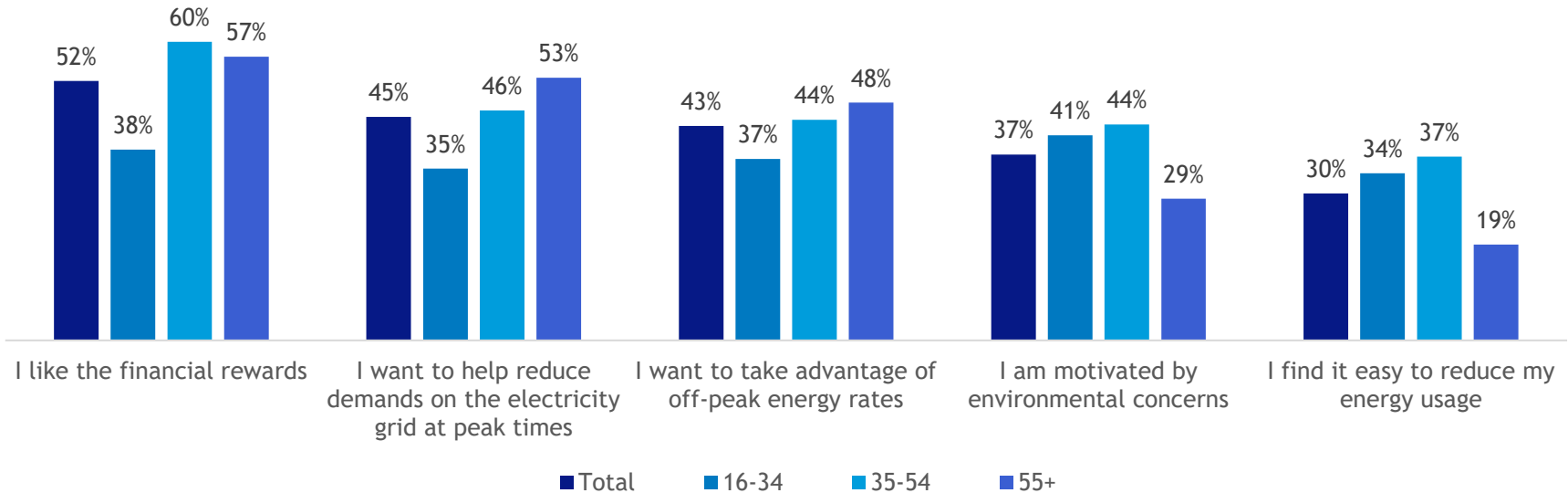
Base: 331 internet users aged 16+ / Source: Kantar Profiles/Mintel; April 2024





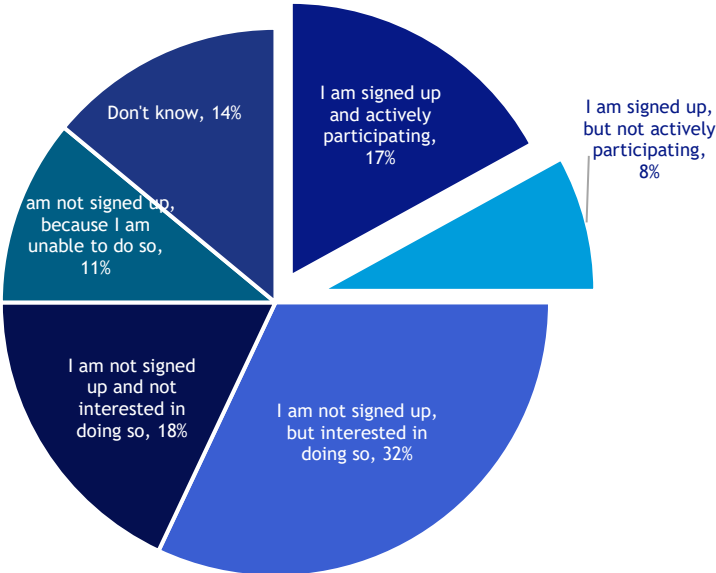
# Financial rewards are especially important drivers among older active participants; while younger consumers are motivated by environmental concerns

Q21b: Why do you participate in an electricity management scheme?, by age

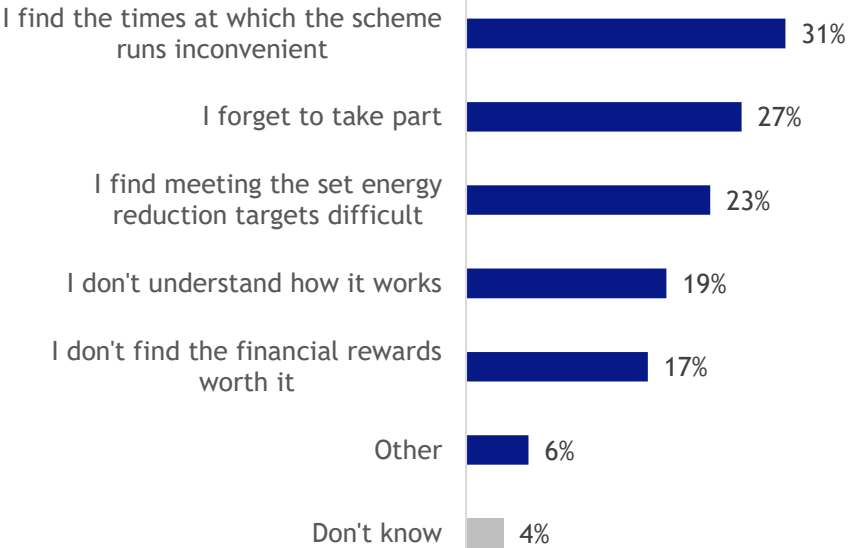


# Convenience is a major barrier for those who are signed up, but not actively participating in EMS

Q21a: Which of the following best describes your participation in electricity management schemes?

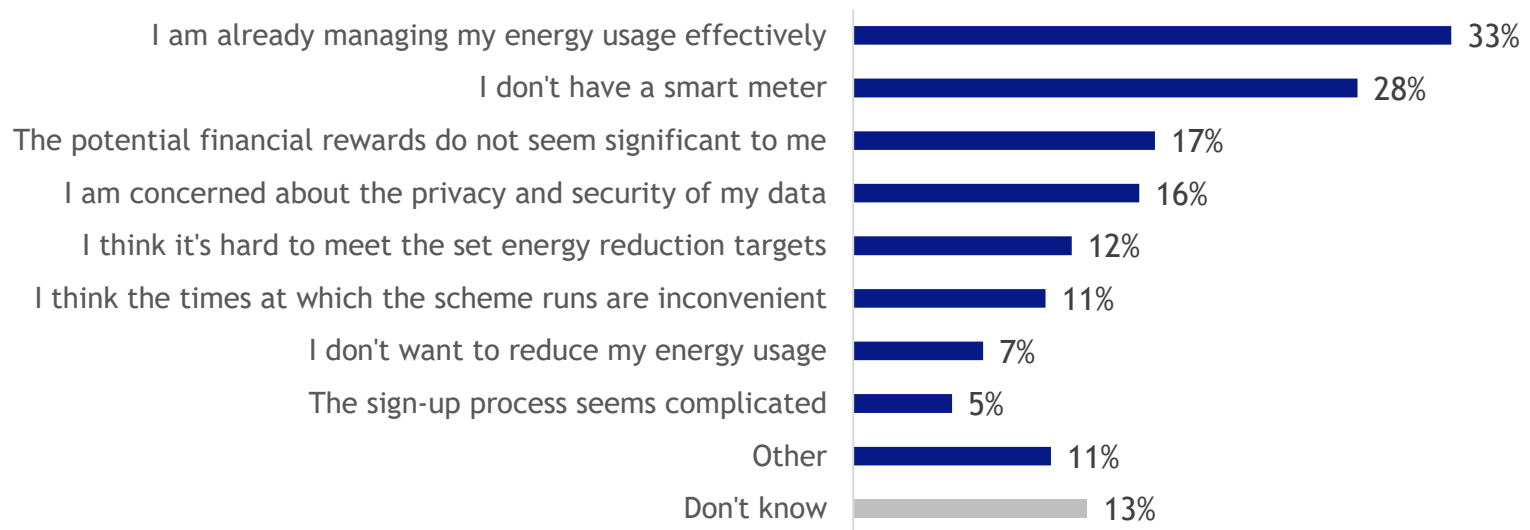


Q21c: Why don't you participate in an electricity management scheme? Please select all that apply.



# No smart meter and poor clarity around the reasons for doing so are holding back many from wanting to sign up

Q21d: Why are you not interested in signing up to an electricity management scheme? Please select all that apply.



# Younger women and older men are the groups least likely to express interest in signing up to EMS in future



Older men see themselves as already managing their energy usage effectively, while younger women say it is too hard to cut their usage - with the latter perhaps reflecting their heightened responsibilities for childcare and therefore the more challenging environment for cutting energy consumption



40%^

Of male respondents aged 55+ who are not currently signed up to an EMS and have not interest in doing so say that it is because **“I am already managing my energy usage effectively”**

Of female respondents aged 16-34 who are not currently signed up to an EMS and have not interest in doing so say that it is because **“I think it's hard to meet the set energy reduction targets”**



18%^ ^

# Attitudes towards Greener Infrastructure



# Key learnings:

## attitudes towards greener infrastructure

1

UK adults feel hopeful about the future due to the development of green energy infrastructure.

2

Younger consumers view green infrastructure like on-shore wind and solar farms more positively, while older generations remain less convinced.

3

Aesthetics are a broader discussion, particularly when it comes to pylons. Many understand the essential role they play, but would like to see a more attractive design that better blends with the landscape.

Green energy infrastructure is a symbol of hope for the future...



Of all UK adults agree that the building of green energy infrastructure in the UK makes them hopeful for the future





...with this sentiment encouragingly seen across the country, particularly in areas where works have already begun

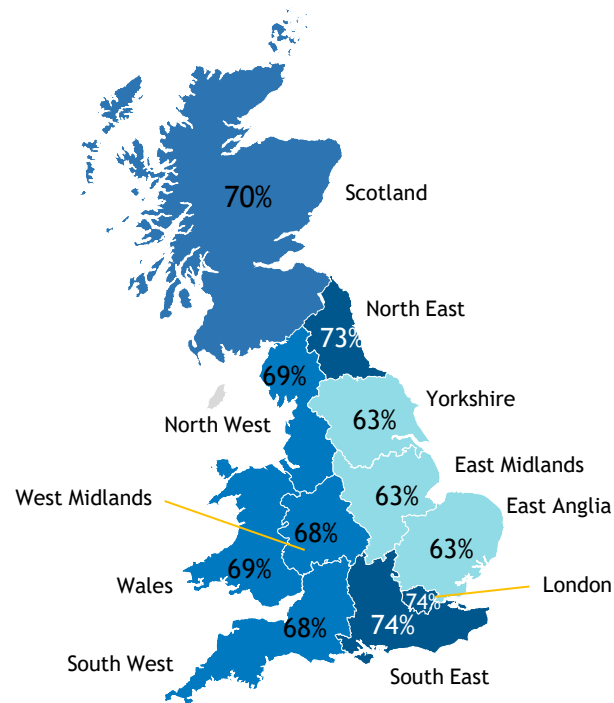
78%

Of adults in the South East and 77% in the East who have already seen selected types of energy upgrade works in their immediate local area agree

Of adults in the South East and 76% in the East who have already seen selected types of energy upgrade works in their wider area agree

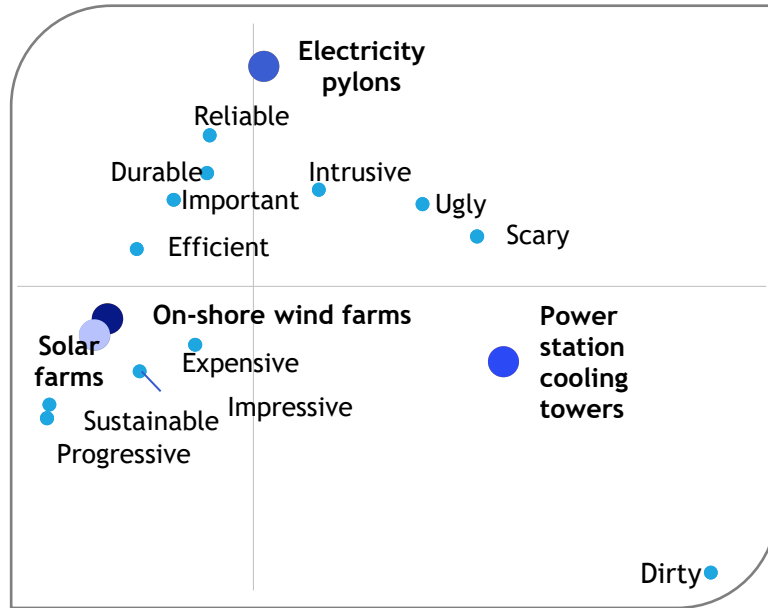
81%

% of adults that agree (NET) that the building of green energy infrastructure in the UK makes them hopeful for the future



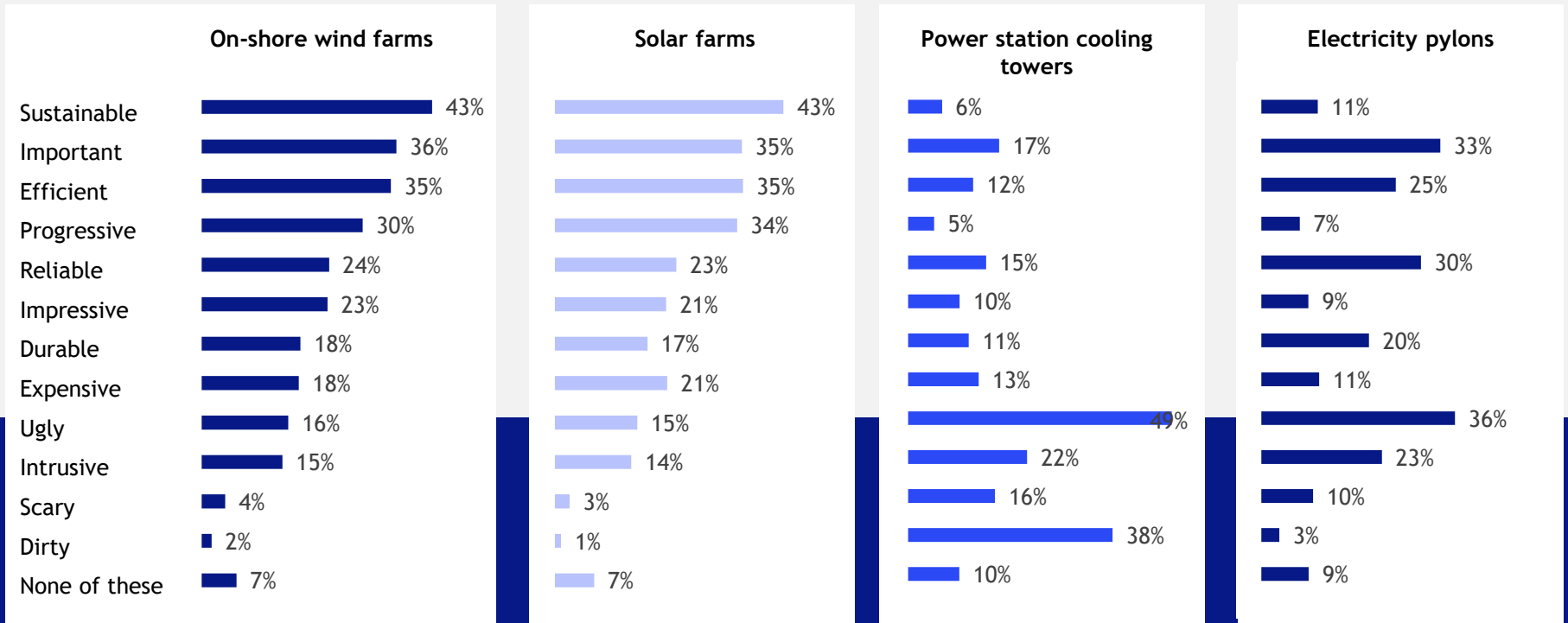
# This broader sentiment also tallies with positive perceptions of green energy infrastructure types

Q5: From the list of words below, please choose which you associate with each type of electricity infrastructure.



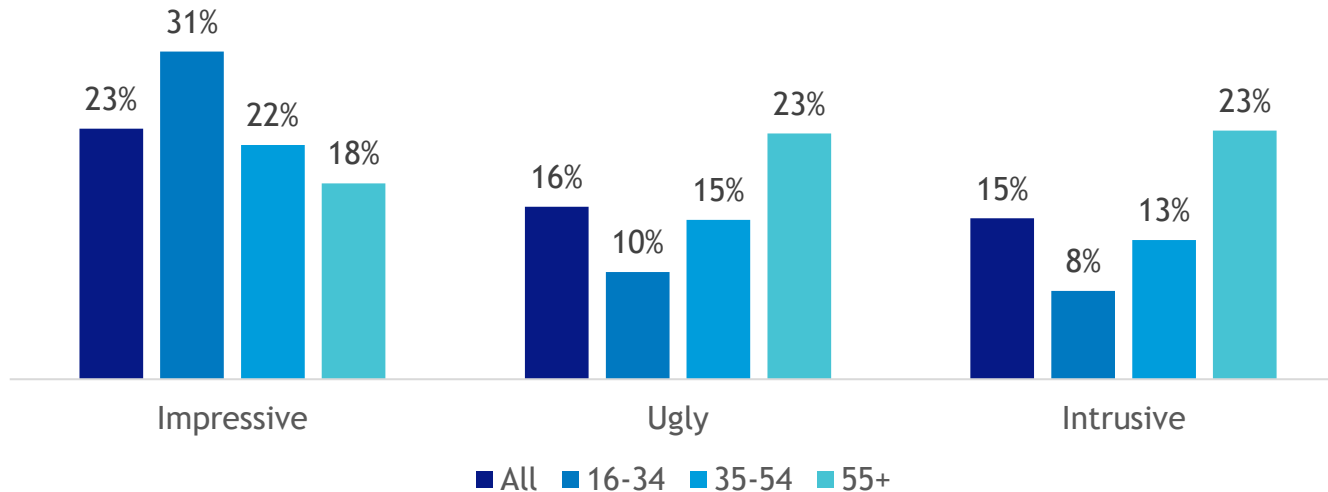
Reliable Durable Important	Electricity Pylons	Intrusive Ugly
	Power Station Cooling Towers	Dirty Scary Ugly
Sustainable Important Efficient	Solar Farms	Expensive
Sustainable Important Efficient	On-shore Wind Farms	Expensive

# Perceptions of on-shore wind farms and solar farms are relatively similar, with sustainable, important and efficient the most commonly associated words



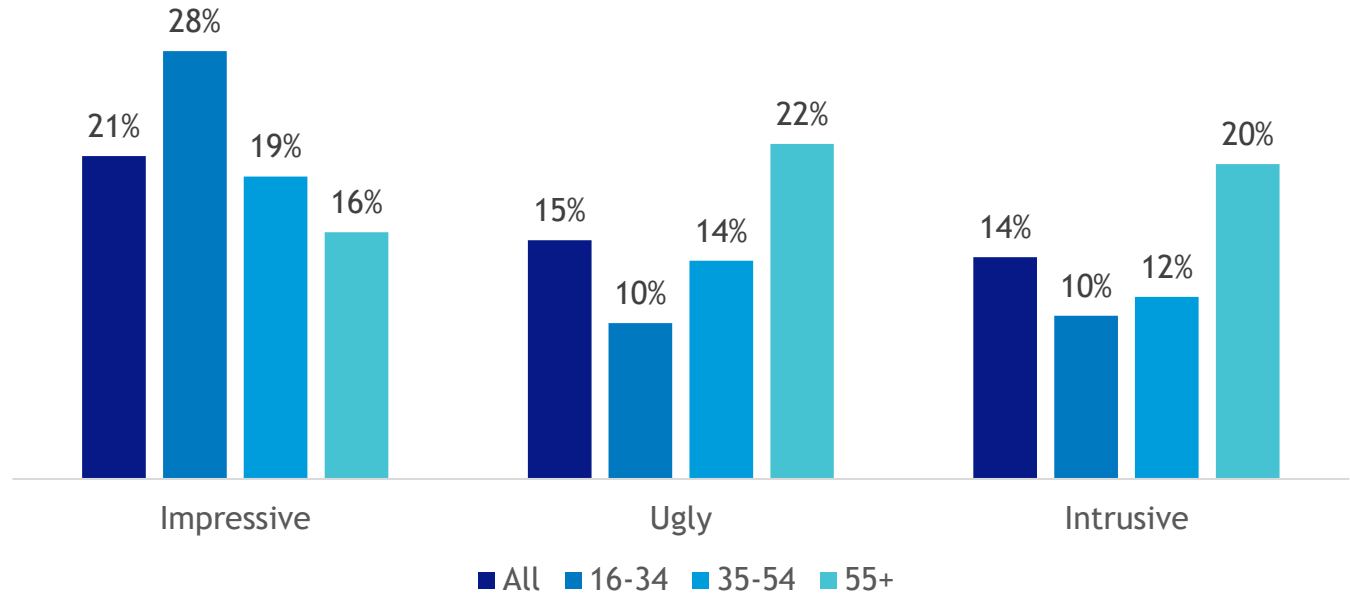
However, this masks relatively significant generational differences, with younger members of the public more positive ...

Selected perceptions of on-shore wind farms (ie areas of land with a group of energy-producing windmills or wind turbines), by age



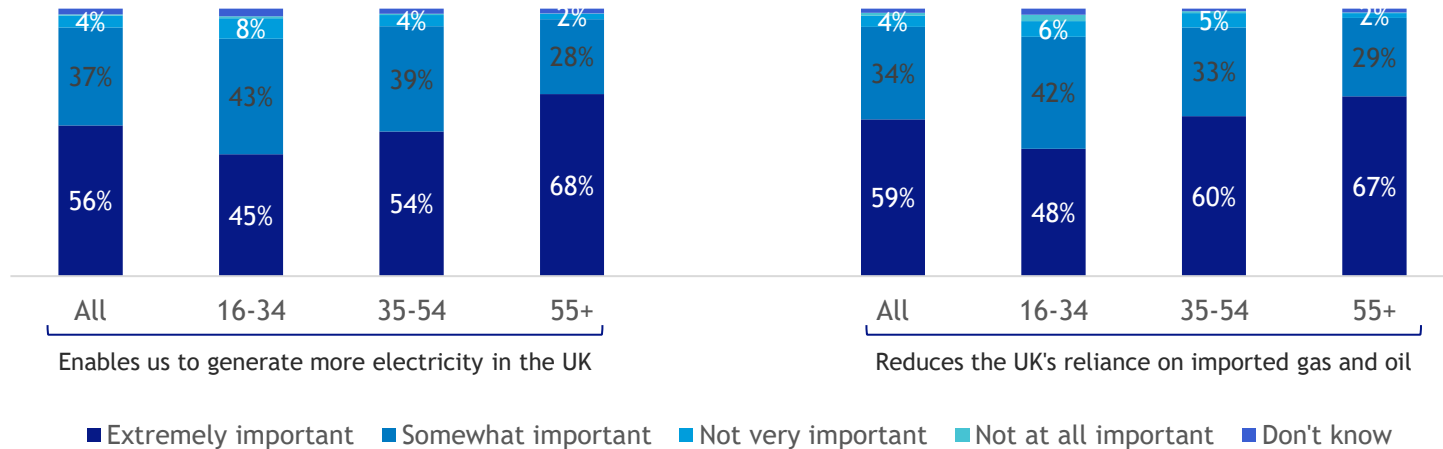
... and the same age skew can be seen for solar farms

Selected perceptions of solar farms, by age



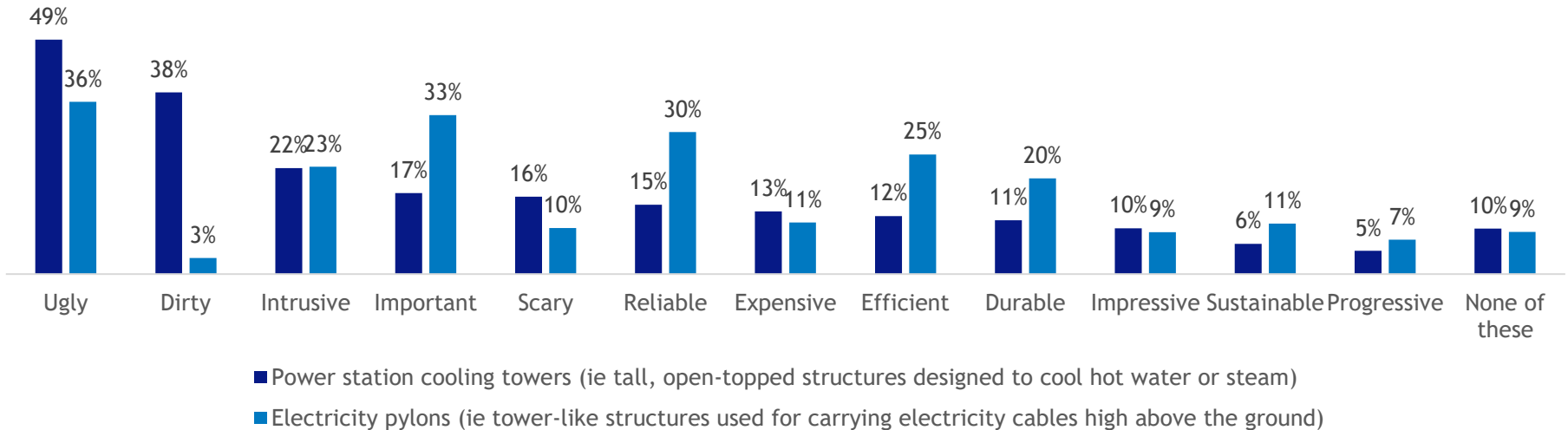
Regardless of perception, there is general consensus that green infrastructure is “important”, and with older generation the most focused on generating more power in the UK; comms can focus on emphasising the energy independence that such infrastructure can bring

Q16: How important do you think it is that the UK’s electricity network upgrade achieves each of the following?

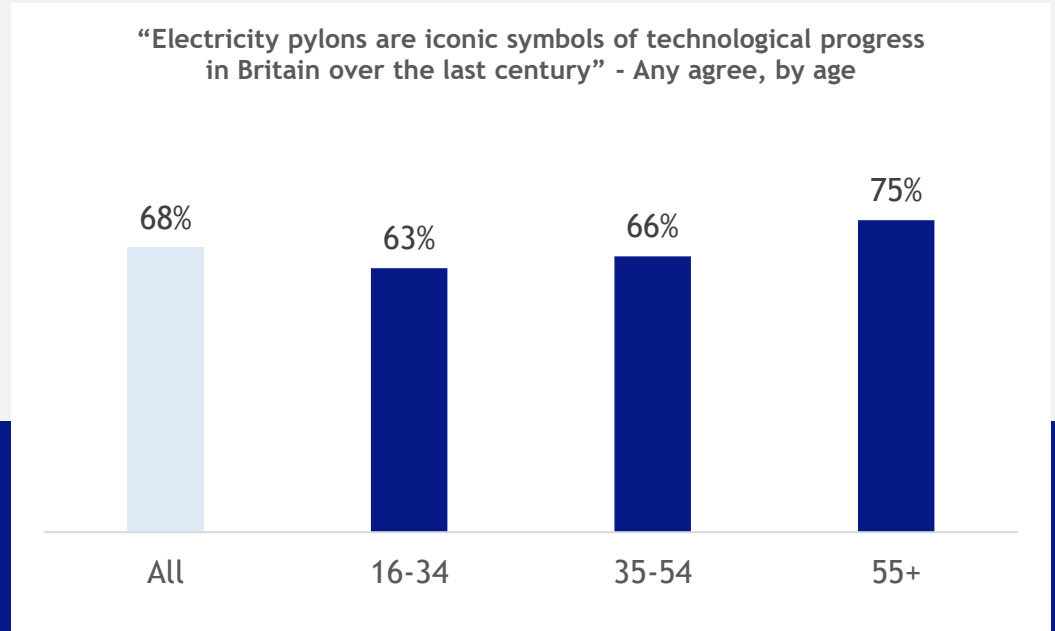
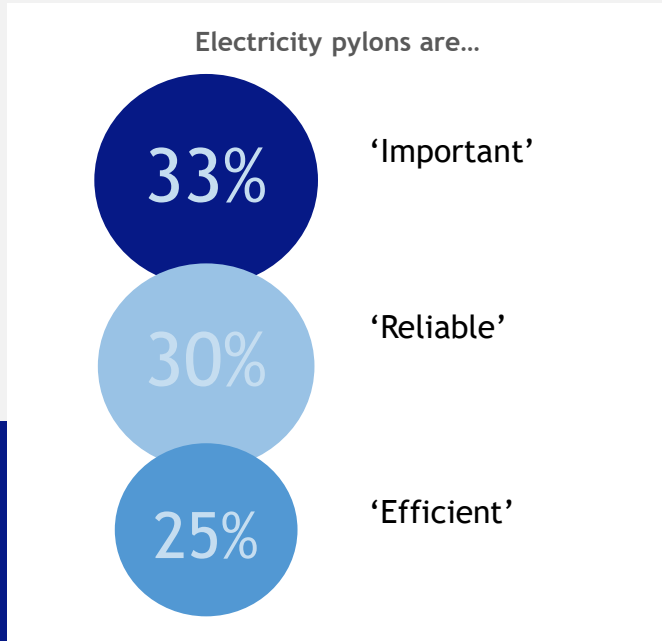


# In contrast to greener infrastructure, perceptions of more traditional electricity infrastructure are more unanimously negative, with ugly, dirty, intrusive and even scary commonly cited associations

Q5: From the list of words below, please choose which you associate with each type of electricity infrastructure. Please select all that apply.



Albeit there is a greater sense of value and acceptance of pylons; many see them as reliable, efficient and important and older generations even consider them to be symbols of Britain's technological progress





Ultimately, across all age groups, but especially older members of the public, there is a strong desire for infrastructure - both new and old alike - to have minimal visual impact on the landscape

“Old or new, it’s important that any electricity infrastructure blends in with the landscape” - Any agree, by age

