



permanent tsb

Reflecting Ireland

An insight into consumer
behavioural change in Ireland



KANTAR

Representatives of our Colleague Network Groups

Executive Summary

For years communication about climate change focused on driving awareness and a sense of urgency. With awareness and concern about climate change now at an all-time high, no doubt helped by the increasing salience of extreme weather events, the challenge has evolved. The priority now is to convince people to take action and secondly move them from intention to action itself.

This quarter, our Reflecting Ireland research focuses on consumer attitudes and behaviours related to Climate Change. Our research, conducted in partnership with Kantar reveals that, despite a high awareness and concern about climate change and it being important to us to be seen as environmentally friendly, the link between how we want to be seen and the actions we are prepared to take is tenuous. Our research identifies that there is a significant Intention – Action Gap when it comes to being more sustainable in our everyday lives. We’ve teamed up with Behavioural Scientist Claire Cogan of BehaviourWise to understand what lies behind the behaviour we are seeing.

Behavioural research¹ shows that “being green” is not a particularly strong motivator to behave in a more climate friendly way. Behavioural science suggests that if we want to change it’s important to take account of what else is going on in people’s lives, what’s important to them, and what will motivate them to change.

- Two thirds of us (63%) feel it’s important to us to be seen as environmentally friendly. However the link between how we want to be seen and the actions we are prepared to take is tenuous. A similar proportion (63%) believe our household is already doing all it can to reduce our carbon footprint, yet we know a lot more needs to be done.
- Climate change is just one of many issues of concern to Irish people today, and it is not the most salient. It ranks 7th in issues we feel need to be addressed, after the cost of living (53%), access to quality healthcare (49%), homelessness (42%), the price of housing (40%), Covid-19 (33%) and affordable rents (32%). While 1 in 4 of us (25%) regard it as one of the top 3 important issues to be addressed, only 6% see it as the most important.
- While almost half of us (46%) believe we bear some personal responsibility to help address climate change, just under 1 in 4 of us (23%) believe we bear primary responsibility. More of us (27%) believe it is first and foremost the Government’s responsibility to address, and 16% of us believe it is primarily the responsibility of heavy industry.
- Less than half of us (45%) believe our personal actions would make any difference, and nearly three in ten (27%) believe there is not enough evidence to link our personal behaviour to climate change.
- All of this points to the fact that, despite high levels of awareness and concern about climate change, there is still a job to be done to convince many of us in Ireland that it is one of the most important issues facing us, that we each bear personal responsibility to take action, and that our personal actions will make a difference.
- Overall we see evidence of the Intention - Action Gap in our findings, where people want to behave in a particular way but struggle to translate it into action. There is also an inverse relationship between which actions we believe contribute most to climate change and which we find easiest to commit to.
- Our research shows that relying solely on concern about climate change to motivate people to take action is rarely enough. We know that most climate friendly behaviours deliver a savings benefit. Evidence from behavioural research¹ shows that focusing on the opportunity to save money as a primary message, supported by the benefits for the climate as a secondary one, is a much more powerful motivator than focusing on benefits for the climate alone

The Reflecting Ireland research series was conducted in October 2021 among a nationally representative sample of 1007 adults aged 18+ in the Republic of Ireland. This study was conducted prior to COP26.

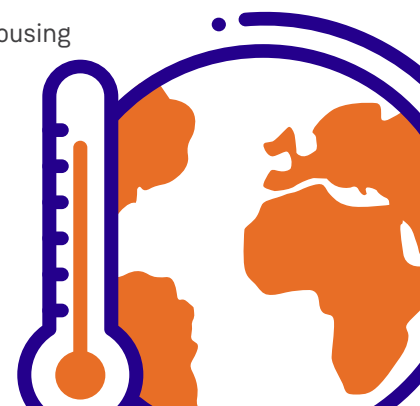
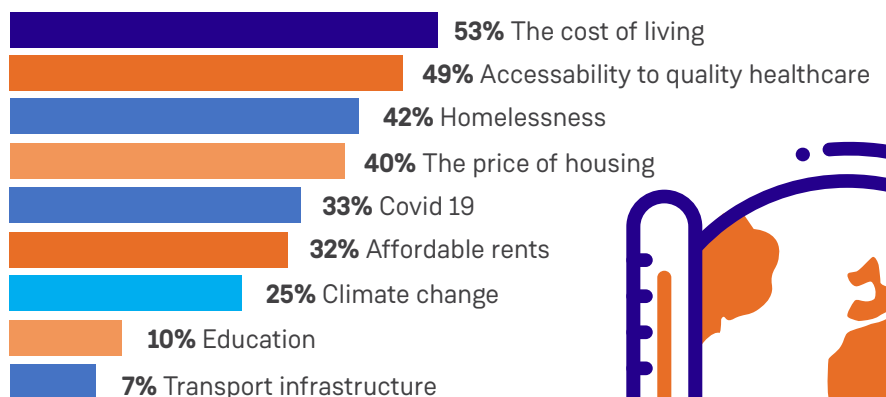
How convinced are consumers that they need to take action

Being seen as environmentally friendly



The relative importance of climate change in our lives

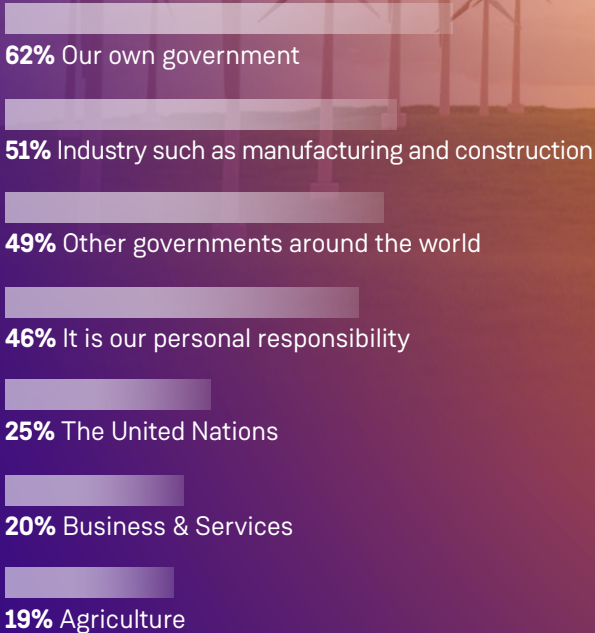
Cognitive load refers to the amount of information our minds can process at any time and there's a limit to this. In a world of information overload our minds will prioritise what is salient, in other words what we see as relevant and important to us. Climate change is just one of many issues of concern to Irish people today, it is not the most salient and ranks 7th.



Taking personal responsibility

While almost half of us (46%) believe we bear some personal responsibility to help address climate change, just under one in four of us (23%) believe we bear primary responsibility. More of us (27%) believe it is first and foremost the Government's responsibility to address, and 16% of us believe it is primarily the responsibility of heavy industry.

Top 3 mentions



Only 1/4

of us regard climate change as one of the top 3 important issues to be addressed in Ireland today.

Only 6%

see climate change as the most important issue in Ireland today.

27%



believe there is not enough evidence to link our personal behaviour to climate change.

Despite high levels of awareness and concern about climate change, there is still a job to be done to convince many of us in Ireland that it is one of the most important issues facing us, that we each bear personal responsibility to take action, and that our personal actions will make a difference.

Moving from intention to action

Saving money as a motivation to act

Evidence from behavioural research shows that focusing on the opportunity to save money as a primary message, supported by the benefits for the climate as a secondary one, is a much more powerful motivator than focusing on benefits for the climate alone. The good news is that there is an opportunity to link what Irish people see as their most pressing concern, the rise in the cost of living, to actions that will address climate change.

The rising cost of living is the most pressing issue for Irish people today.



53%

regard the cost of living as one of the top 3 issues to be addressed in Ireland



23%

expect their financial situation to be worse off this time next year

1/5

of us believe it to be the most important



In the run-up to Christmas, the need for value for money is even more salient.

75% Value for money is most important to me

62% I intend to buy more Irish products this year

47% I intend to buy products that use less packaging

38% Christmas is a time for letting go and not worrying about my purchases

30% I intend to buy from retailers that promote environmental responsibility

28% I intend to buy products/brands that are ethically sourced and manufactured

20% I intend to buy products that have a lower carbon footprint

3/4

of us say that value for money is a key consideration when thinking about Christmas shopping



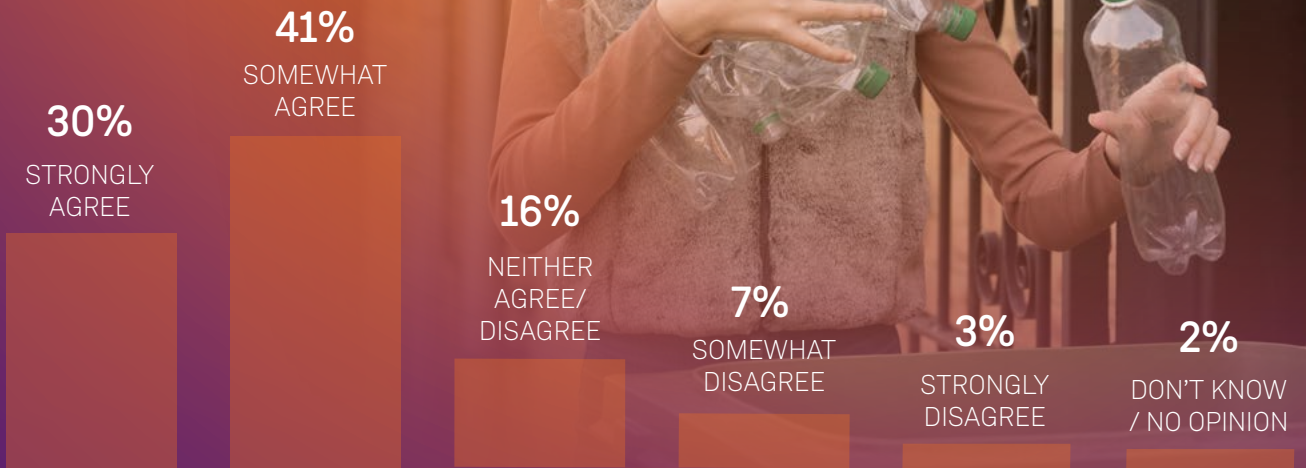
47%

of us say buying products that use less packaging is important

Only top of mind for 6% of us

Value for money comes well ahead of other environmental concerns such as buying from environmentally responsible retailers (30%) or buying products or brands that are ethically sourced or manufactured (28%); that's only considered top of mind for 6% of us. Buying products with a low carbon footprint is seen as important for 1 in 5 of us but only top of mind for 3% of us.

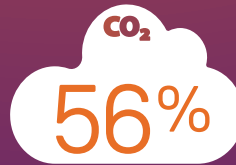
Trying to be as environmentally friendly as possible will cost me money



We know that many behaviours that help address climate change can also deliver a financial saving. Yet 71% of us believe that behaving in an environmentally friendly way will cost us money. What emerges is a clear opportunity to frame the message about climate friendly behaviour around the reward of financial savings as well as the benefits for the climate.



64% agree that developing public transport should take precedence over new roads, and that more cycle lanes should be developed on public roadways.



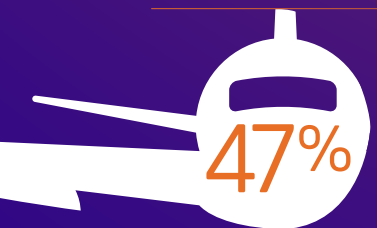
56% believe there should be a total ban on smoky / solid fuels

72%

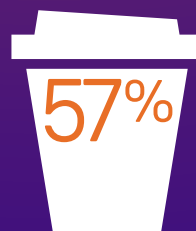
believe that public transport should be subsidised

39%

of us would be open to a surcharge on high carbon emitting food products



47% believe there should be a levy on air travel



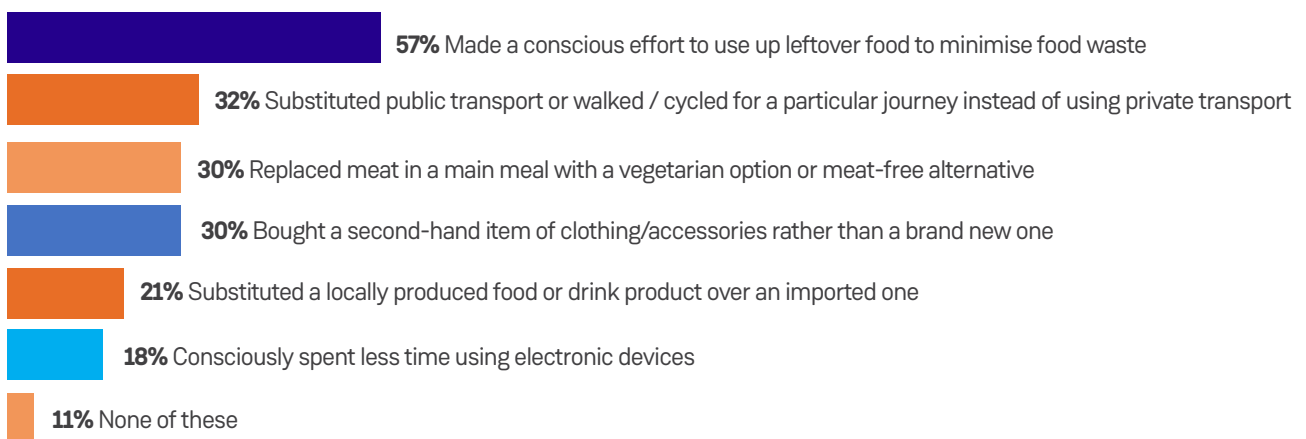
57% feel there should be a surcharge on non-recyclable products

While we have clear views about what Government should be doing, when it comes to our own behaviour things are less straightforward. Although 63% of us feel our household is already doing all it can to reduce our carbon footprint, we know that if we are to reach our national emission reduction targets each household will have to do more.

Trying to be as environmentally friendly as possible will cost me money

There is an inverse relationship between which actions we believe contribute most to climate change and which we find easiest to commit to. People rank the use of fossil fuels - for transport and for heating and powering our homes - as the lead contributor to climate change but the hardest to commit to reducing. Reducing food waste, on the other hand, is seen as the easiest action to commit to but is one that people perceive to have little impact on climate change. This points to a need to make the behavioural changes that people find difficult to commit to feel easier.

Taking steps



Of the personal actions people have taken to address climate change over the past 3 months the most popular, taken by 57%, is consciously reducing food waste. This is also the one they find easiest to commit to. Yet the belief is that food waste contributes little to climate change. The next most popular actions, each taken by a third of us over the past 3 months, include using public transport or walking / cycling, replacing meat in a main meal with a vegetarian or meat free option, and buying second hand-clothing / accessories instead of new. Over the last 3 months 1 in 3 have substituted public transport or walked / cycled for a particular journey rather than

used private transport. However they find this less easy than other areas to commit to on a regular basis. A similar proportion (30%) have replaced meat in a main meal with a vegetarian option or meat-free alternative. Again, people don't feel this is an easy thing to commit to a regular basis, and feel it has less impact on climate change than other areas. A similar proportion (30%) have bought second-hand items of clothing / accessories rather than new, an action they feel is relatively easy to commit to and one they believe contributes significantly to climate change.

Other climate-friendly actions have been taken by 1 in 5 of us over the past 3 months. These include

choosing a locally produced food or drink product over an imported one (21%), considered relatively easy to commit to and relatively impactful in terms of climate change.

Another is consciously spending less time on electronic devices (18%), considered to have more of an impact on climate change than food related areas, but not being as easy to commit to on a regular basis.

While it is good news that many of us have taken concrete actions to address climate change, it is also clear that more needs to be done to convince people to adopt regular sustainable habits. People need to be convinced that their efforts will make a difference.

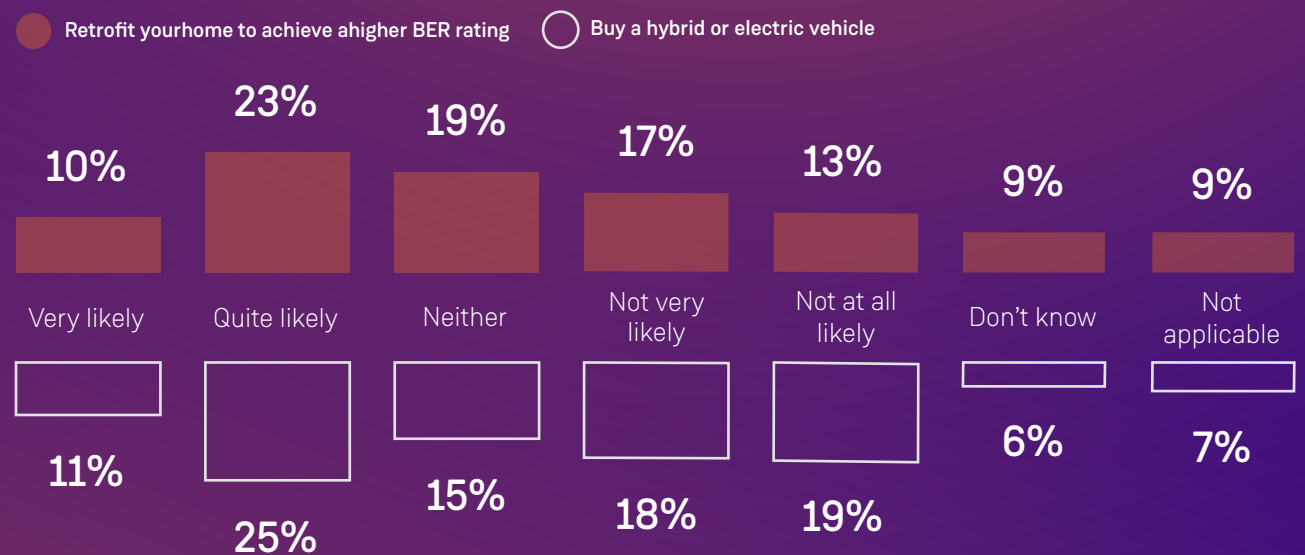
Evidence of an Intention-Action Gap

Where people want to behave in a particular way but struggle to translate it into action, we call this the Intention-Action Gap, and we see some evidence of this in our findings.

INTENTION		ACTION	
Agree we need to move away from our reliance on vehicles that depend on petrol or diesel	61%	Have substituted public transport or walked / cycled for a particular journey instead of using private transport over the past 3 months	32%
Agree I am prepared to change what I eat to help tackle climate change	54%	Have replaced meat in a main meal with a vegetarian option or meat-free alternative over the past 3 months	30%

Twice as many of us agree we need to move away from our reliance on petrol / diesel vehicles, compared to those of us that have made a deliberate decision to choose public transport or walk / cycle for a particular journey over the past 3 months. Over half of us say we are prepared to change what we eat to help tackle climate change, yet just under a third of us deliberately replaced meat in a main meal with a vegetarian option or meat-free alternative over the past 3 months.

Big ticket purchases and the importance of financial incentives



Our research shows that approximately a third of us are considering buying a hybrid or electric vehicle (35%) or retrofitting our home (33%) sometime over the next 3 years, but we expect the Government to help us.



24%

agree they would be prepared to retrofit their house at their own expense

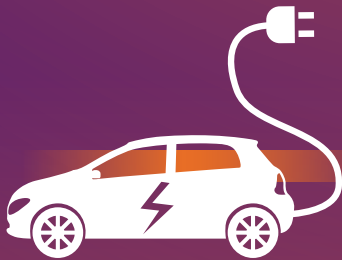


64%

agree they would be prepared to retrofit their house if they got government assistance

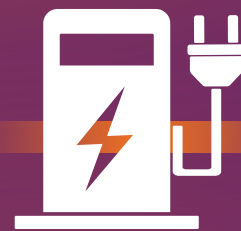
Financial incentives are an effective way to bridge the intention-action gap when it comes to retrofitting homes. The proportion of those prepared to consider it is two and a half times greater when Government assistance is offered than when it would have to be self-financed.

When it comes to purchasing electric vehicles, we rationalise that there are two ways in which the Government can help us: provide financial incentives to help reduce the cost barrier and invest in infrastructural development.



71%

agree there should be more incentives to buy electric vehicles



72%

feel the infrastructure to allow for electric cars is lacking

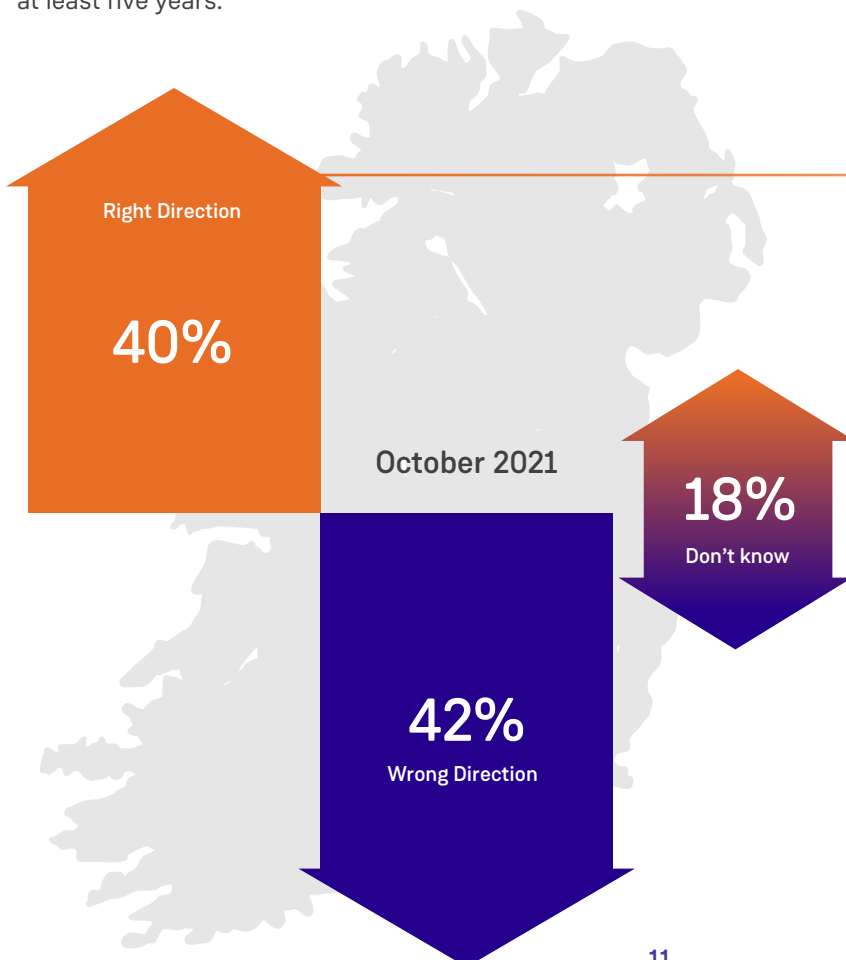
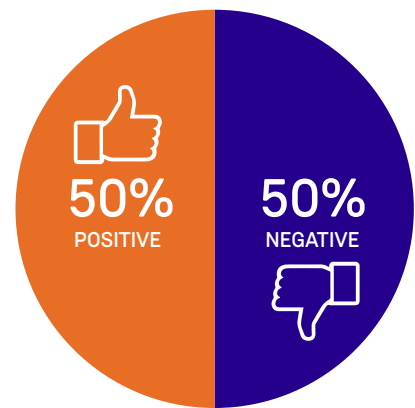
While approximately 1 in 3 of us (29%) would be prepared to pay more for electric vehicles and a similar proportion (31%) feel there should be higher taxes on petrol / diesel cars, a majority of us disagree (45% and 43% respectively), preferring to place the onus on the Government to reduce the barriers.

Macro-Economic Consumer Sentiment

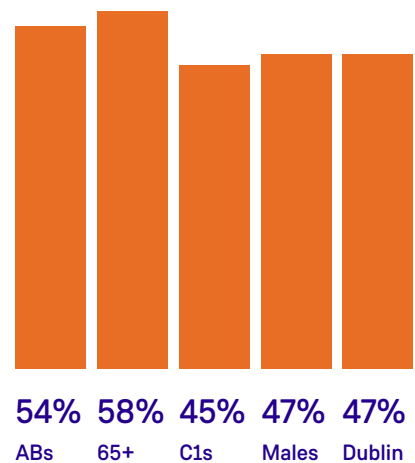
Examining consumer sentiment at a broader level, opinion is sharply polarised in terms of whether we are going in the right direction or are on the wrong track.

Those believing the country is heading in the right direction has fallen back by 8% since our last report, while the population believing the opposite has grown by 7%, to reach its highest level in at least five years.

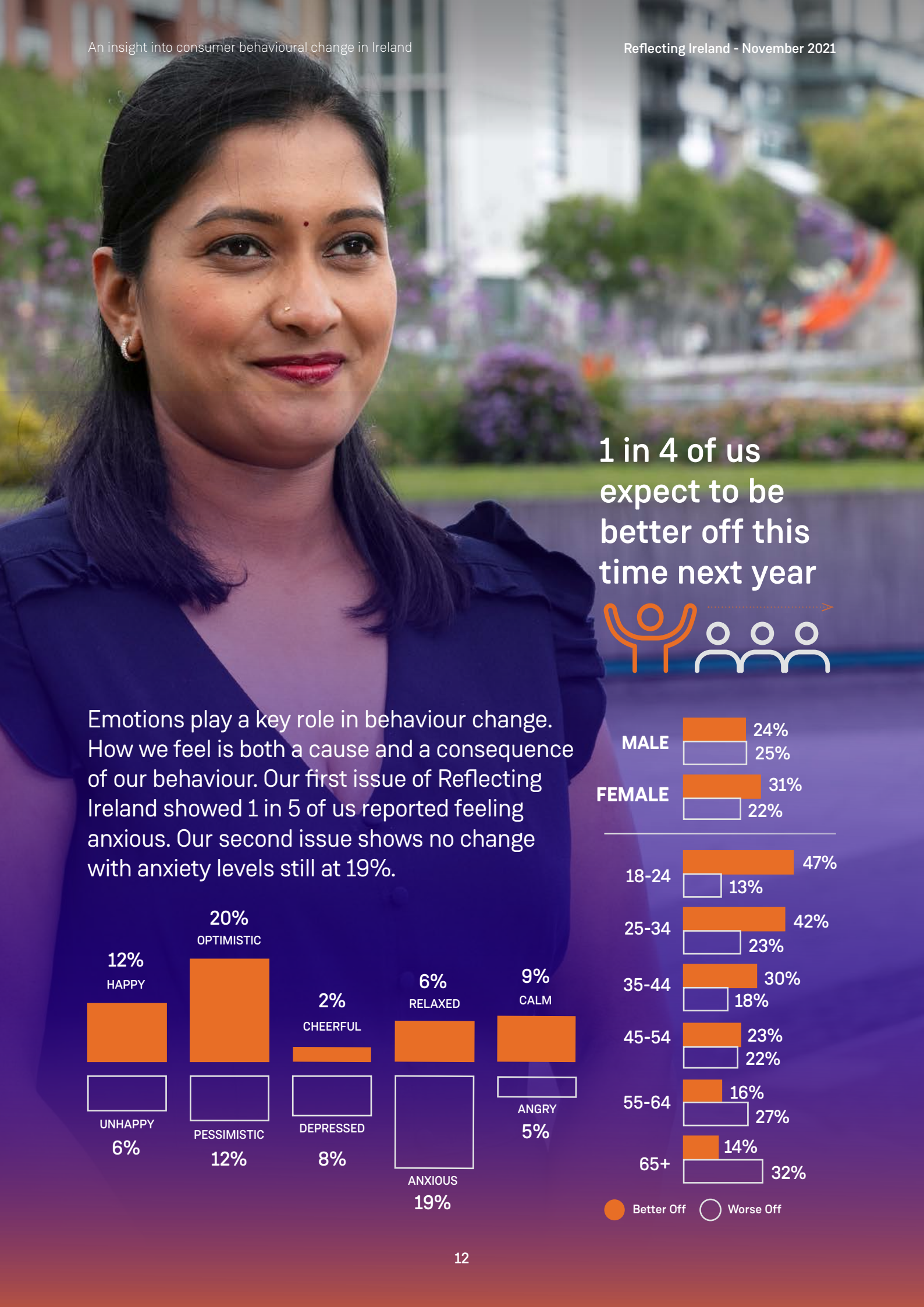
Our personal mood is exactly evenly divided- 50% negative and 50% positive. Negative mood is at its highest level since before April 2017.



Higher Among:



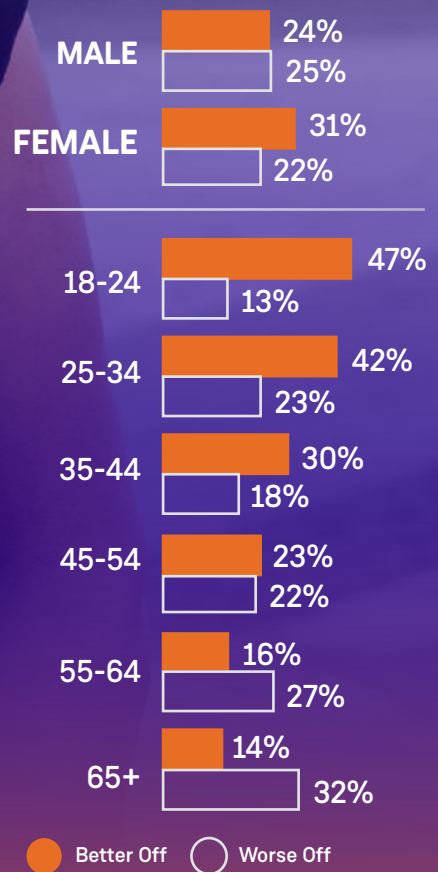
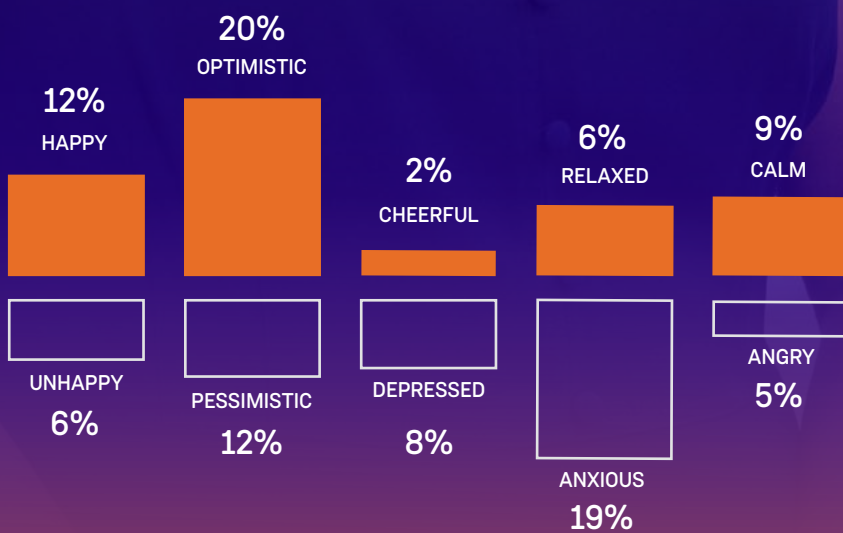
Broadly speaking ABs are defined as Professionals, C1s are White Collar workers, C2s are Skilled Blue Collar workers.



1 in 4 of us expect to be better off this time next year



Emotions play a key role in behaviour change. How we feel is both a cause and a consequence of our behaviour. Our first issue of Reflecting Ireland showed 1 in 5 of us reported feeling anxious. Our second issue shows no change with anxiety levels still at 19%.



Reflecting the Nation

Most Pressing Issues for Irish Consumers

While we cannot be sure exactly what is driving this anxiety, the results from this study reveal that the top 3 most concerning issues across Ireland today are: 1) the cost of living, 2) accessibility to quality healthcare, and 3) homelessness.

Most important issues by region relative to Climate Change.

CONNACHT & ULSTER



Cost of Living: **58%**
 Access to Quality Healthcare: **57%**
 Homelessness: **37%**
 Climate change: **21%**



Price of Housing: **49%**
 Cost of Living: **47%**
 Access to Quality Healthcare: **42%**
 Climate change: **23%**

LEINSTER



Access to Quality Healthcare: **51%**
 Homelessness: **49%**
 Cost of Living: **47%**
 Climate change: **31%**

MUNSTER



Cost of Living: **60%**
 Access to Quality Healthcare: **59%**
 Homelessness: **43%**
 Climate change: **24%**

Urban/Rural Divide

People living in urban areas show a greater appetite for climate-friendly measures such as taxes to promote green initiatives (38% in favour in urban areas, versus 28% in favour in rural locations) and a ban on smoky fuels (54% in favour in urban areas, versus 38% elsewhere). Reflecting the wider availability of public transport alternatives, Urbanites were also more likely to agree that reduced usage of cars was a reasonable proposition (35% vs 25%).

Methodology

Permanent TSB and Kantar's Reflecting Ireland research series looks at how consumer behaviour is changing in Ireland.

Our second report focuses on macro-economic consumer sentiment and consumer attitudes towards climate change.

- Interviews were conducted online among a sample of those aged 18+.
- Quota controls were set on gender, age, social class and region to mirror the 18+ population profile.
- 1007 interviews were conducted in total.
- Interviews were carried out between 21st – 29th October 2021.
- Data weighted to reflect the adult population aged 18+.
- The margin of error for this research is +/- 3.1%.

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1. Behavioural Architects, September 2021: Tackling Climate Change from Home: How to Turn Good Intentions into Positive Actions. A research report by The Behavioural Architects Commissioned by Smart Energy GB'

