Consumer attitudes to the circular economy

Consumer Council for Northern Ireland research report

July 2024

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1. Executive summary

In February 2024 the Consumer Council commissioned Cognisense to administer a research project to gather information on consumers' knowledge, experience and attitudes in relation to sustainability and a circular economy, the findings from which are to be used to help inform policy and representation activities.

This research included a survey of 1,000 respondents and a separate programme of 12 in-depth interviews. Some of the key results from the former are detailed in this section of the report. (The findings from the in-depth interviews largely reflect those from the survey.)

The results of the survey show that 88% of respondents indicated that they are aware of the term sustainability in regard to the environment. Waste reduction (79%), reducing carbon footprint (78%), producing sustainable packaging (75%) and conserving waste and natural resources (70%) were the four key areas respondents identified as being covered by sustainability.

It is evident from the research that further education is required regarding sustainability terms and concepts, particularly around circular economy, with more than half (56%) stating that they were not familiar at all with the term. Respondents were much more likely to have some level of familiarity with the terms greenhouse gas emissions and net zero (93% and 81% respectively). However, only 53% reported that they know what to do to help Northern Ireland reduce greenhouse gas emissions.

The findings from the research show that the factor most likely to encourage the adoption of a more sustainable lifestyle is lower prices (72%) – a factor that is particularly motivating amidst the current cost of living crisis. Whilst around half of respondents stated that more clarity on how to dispose of/recycle old products (54%) and support in affording sustainable products (52%) would encourage them to adopt a more sustainable lifestyle, it is clear that these type of activities are seen to be less important than lower costs and better services.

The analysis shows that there is strong support for product longevity, better design and promotion of repair and reuse services, where at least 90% of respondents indicated agreement with these types of initiatives. A strong level of support was also reported (72%) for takeback schemes by companies when products reach their end of life, but fewer respondents indicated agreement with initiatives that would lead to the banning of products (38%).

The survey results show that consumers are actively taking actions to reduce the negative impact on the environment when purchasing household goods. Two-thirds (67%) of consumers already repair goods when worn or broken (a further 26% stating that this is something that they would consider doing), 55% already buy second hand/refurbished goods (a further 27% stating that this is something that they would consider doing) and 56% choose products with reusable and recyclable packaging (a further 35% stating that this is something that they would consider doing). However, only 24% stated that they consider the environmental impact in their choice of product and 17% reported that more options for a plant-based diet would be an encouraging factor.

The survey findings show that a high proportion (69%) of respondents already buy locally produced food from local business, with cost being cited as the most popular reason for not doing so (54%). However, it is clear that in relation to making changes to food choices, the survey shows that there are a high proportion of respondents who would not consider a vegan (75%) or vegetarian diet (62%) or consider switching to meat (61%) or dairy (53%) substitutes. The key reason provided for not making these changes was lack of appeal to respondents (at least 60% in all four actions).

The NI Government was most likely, on average, to be considered the organisation which should take responsibility for encouraging a more circular economy, followed very closely by the UK Government. However, individuals were, on average, ranked lowest of the six categories by respondents in terms of who should take responsibility for becoming more circular.

Regarding things they could personally do to help reduce environmental impact, 58% stated that they would recycle more waste – markedly higher than the number that would be likely to take actions that perhaps require more significant commitment, such as cutting back on heating usage (32%), improving home energy performance (28%), cutting back on water usage (17%), and participating in leasing schemes to keep products in use (7%).

2. Background and methodology

2.1 The Consumer Council

The Consumer Council is a non-departmental public body (NDPB) established through the General Consumer Council (Northern Ireland) Order 1984. Its principal statutory duty is to promote and safeguard the interests of consumers in Northern Ireland. The Consumer Council has specific statutory duties in relation to energy, postal services, transport, water and sewerage, and food affordability, which include considering consumer complaints and enquiries, carrying out research and educating and informing consumers.

To support the delivery of its duties, the Consumer Council undertakes research activities which provide insight into consumer issues in Northern Ireland.

2.2 Research objective

The Consumer Council commissioned Cognisense to administer a research project to gather information on consumers' knowledge, experiences and attitudes in relation to sustainability and a circular economy. The findings from the research are to be used to help inform policy and representation activities.

2.3 Methodology

A survey questionnaire was developed in collaboration with the Consumer Council and the Department for the Economy, which is currently in the process of finalising a Circular Economy Strategy for Northern Ireland. In February 2024, 1,000 Northern Ireland (NI) residents completed this questionnaire online. Strict controls based on official population estimates were employed regarding the sex, age, socio-economic group and the area of residence of those that completed the survey to ensure that the final sample was representative of the NI population regarding these demographics.

The data that was collected in the survey was analysed using software developed by the company NIPO specifically to meet the needs of market research professionals. This analysis involved the coding of all open-ended questions in the survey, cross-tabulation of data by relevant demographics, and the application of corrective RIM weighting[1].

To provide additional insights, the survey was followed in March 2024 by a programme of 12 in-depth interviews. These were 45-minute sessions in which a moderator discussed with an individual a number of topics that had been agreed in advance with the Consumer Council and the Department for the Economy. To ensure that a broad range of consumers were represented, the individuals who participated came from a variety of demographic backgrounds. Once the programme of in-depth

[1] A statistical technique used to adjust sample data to match known population statistics. For example, if a population is split evenly between males and females, but a survey delivers more males than females, then RIM weighing can be used to make the female responses count more than those of the males, thereby delivering a sample that is more representative of the population.

interviews was complete, the moderator analysed the data collected, identified key themes and areas of interest, and pulled together quotations for illustrative purposes.

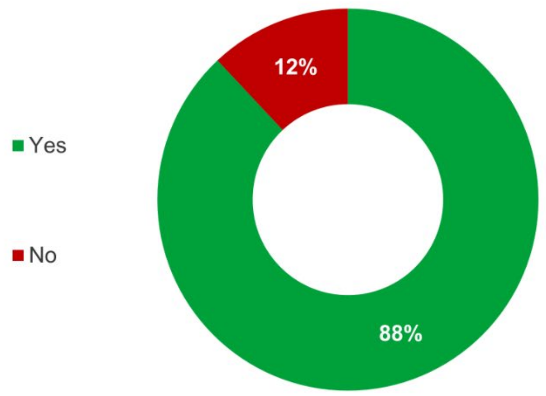
2.4 Technical notes

At the bottom of each chart in this report, the relevant question from the survey and the number of individuals who responded to it (the ‘base’) are detailed.
As a result of the rounding of figures or the use of questions for which multiple answers could have been given, the sums on the charts may not always total 100%.

3. Main findings

3.1 Awareness of the term sustainability

Figure 1

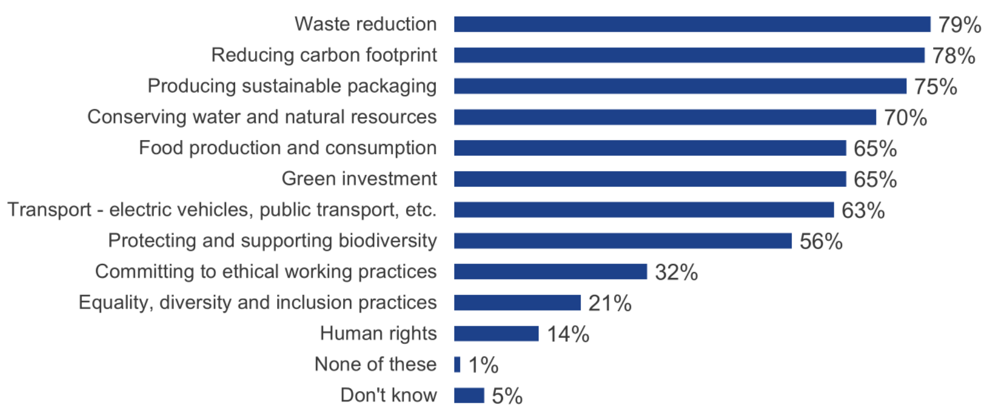


Q. Are you aware of the term 'sustainability' in regard to our environment?
Base: all respondents (n=1000)

Almost nine in ten (88%) consumers were aware of the term sustainability in regard to the environment (Figure 1).

3.2 Understanding of sustainability

Figure 2



Q. Which of the following areas, if any, do you think sustainability covers?
Base: all respondents (n=1000)

Waste reduction (79%), reducing carbon footprint (78%), producing sustainable packaging (75%), and conserving water and natural resources (70%) were the areas most likely to be felt to be covered by sustainability (Figure 2).

Considerably fewer consumers felt that sustainability covered the following: commitment to ethical working practices (32%); equality, diversity and inclusion practices (21%); human rights (14%).

Amongst interviewees, understanding of sustainability tended to reflect the findings from the consumer survey.

‘Sustainability is all about trying to make sure that we leave this place as we found it and protect it for the future generations and it covers literally everything … from what product you buy from which shop, what type of vehicle you buy.’

‘Trying to use as many methods and practices as we can to ensure longevity to everything around us … conserve natural resources, create less pollution, less waste, reuse as much as possible, recycle more.’

‘Conserving natural resources. Ensuring you are sensible with your decisions regarding things like fast fashion.’

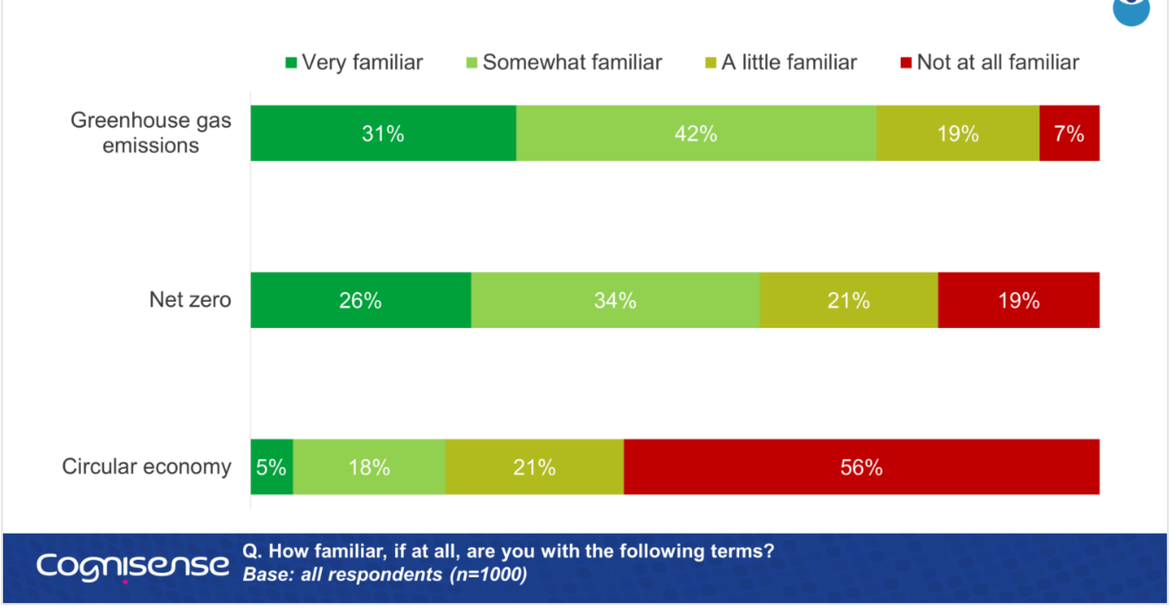
‘Sustainability involves using resources wisely, without depleting them for future generations. It is the steps taken to protect the planet.’

‘Expanding the use of recyclable/recycled products and reducing dependence on products which can negatively impact the environment, like fossil fuels. Being more efficient with construction projects, including houses and office buildings, to reduce the need for excess space.’

‘Sustainability is all to do with our environment. Making the world greener. Recycling, cutting down on carbon emissions, eating more plant-based food, using less packaging.’

3.3 Familiarity with the terms circular economy, greenhouse gas emissions, and net zero

Figure 3



Around nine in ten (92%) consumers stated that they were familiar with the term greenhouse gas emissions, whilst 81% stated that they were familiar with the term net zero (Figure 3). Notably fewer (44%) consumers stated that they were familiar with the term circular economy.

Interviewees were more confident in their understanding of the terms greenhouse gas emissions and net zero than they were regarding circular economy. Amongst those interviewees familiar with the term circular economy, their definitions tended to be drawn from the name itself.

[Greenhouse gas emissions are] ‘the chemicals we create on Earth that are affecting climate change.’

[Greenhouse gas emissions are] ‘harmful gases which damage the planet’s ozone layer … caused by burning fossil fuels.’

[Greenhouse gas emissions are] ‘the release of gases into the atmosphere through the burning of fossil fuels. Industrial businesses and food production are big contributors.’

[Net zero is] ‘completely getting rid of greenhouse gas production from humans through reducing emissions.’

[Net zero is] ‘balancing carbon emissions.’

[Net zero is] ‘an equilibrium of gases into the atmosphere and those being removed.’

[Net zero is] ‘the aim of reducing emissions caused by fossil fuels to the point of balancing to neutral, so negative emissions don’t outweigh efforts to clean the environment.’

‘I've heard the term [net zero], but don't fully understand it. I would imagine that the end result would be to have a net zero impact on the environment.’

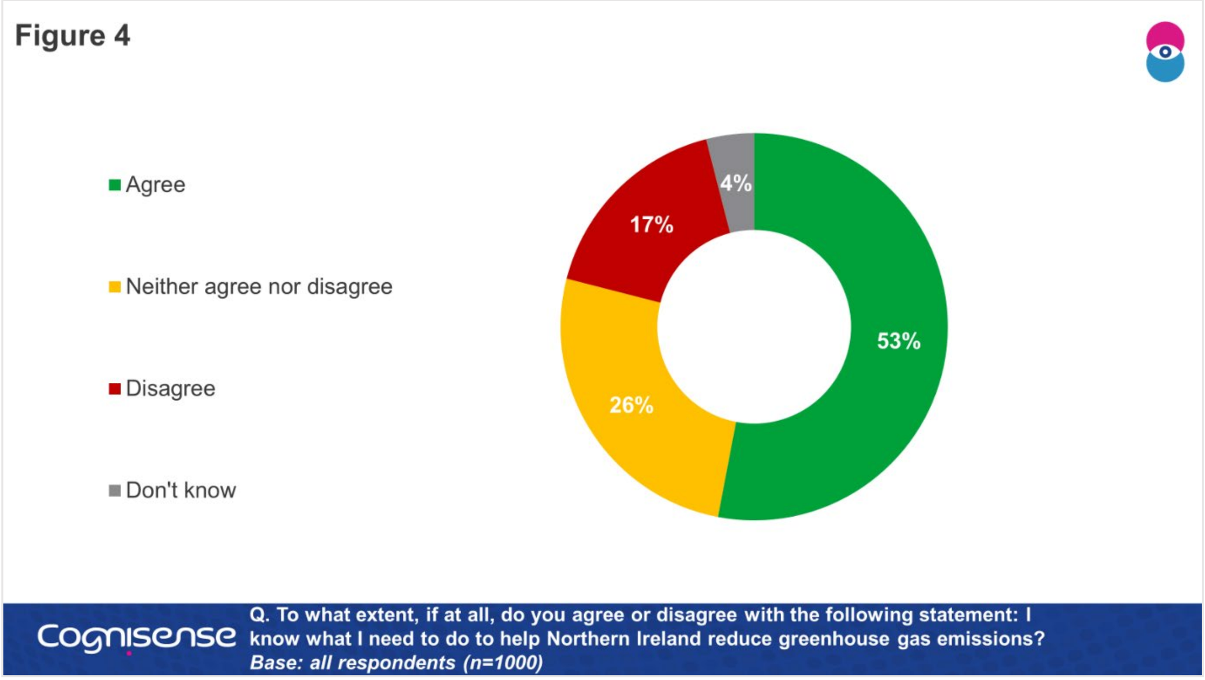
[Circular economy is] ‘keeping a cycle of life going with goods/food/materials where possible.’

[Circular economy is] ‘sharing, reusing and recycling products for as long as possible.’

‘Does [circular economy] mean it's a repetitive thing … that one thing feeds into the other and feeds back into it.’

3.4 Extent of agreement: I know what I need to do to help Northern Ireland reduce greenhouse gas emissions

Consumers were informed of the following: Northern Ireland has a target to reach Net Zero by 2050, this means achieving an overall balance in the emissions that we produce and those we remove from our atmosphere.



Around half (53%) of consumers agreed that they know what they need to do to help Northern Ireland reduce greenhouse gas emissions, 26% were neutral, whilst 17% disagreed that this is the case (Figure 4).

Most interviewees felt that they know what they need to do to help Northern Ireland reduce greenhouse gas emissions, though for some, entrenched habits mean that taking action is unlikely.

‘I do as much as I can: driving less, walking more, recycling. More can be done, but sometimes inconvenience and cost mean I probably don’t do as much as I should.’

‘I feel that in the media and in education it is widely encouraged to keep carbon emissions low and there are ideas presented to suggest how this can be done in our everyday lives.’

‘Reducing, reusing and recycling, using food waste bins, walking instead of driving, eating and buying sustainably are some ways in which I, as an individual, can reduce greenhouse gases.’

‘To a certain degree I know what I need to do but, it’s hard to get into the way of it and break bad habits that have formed over the years.’

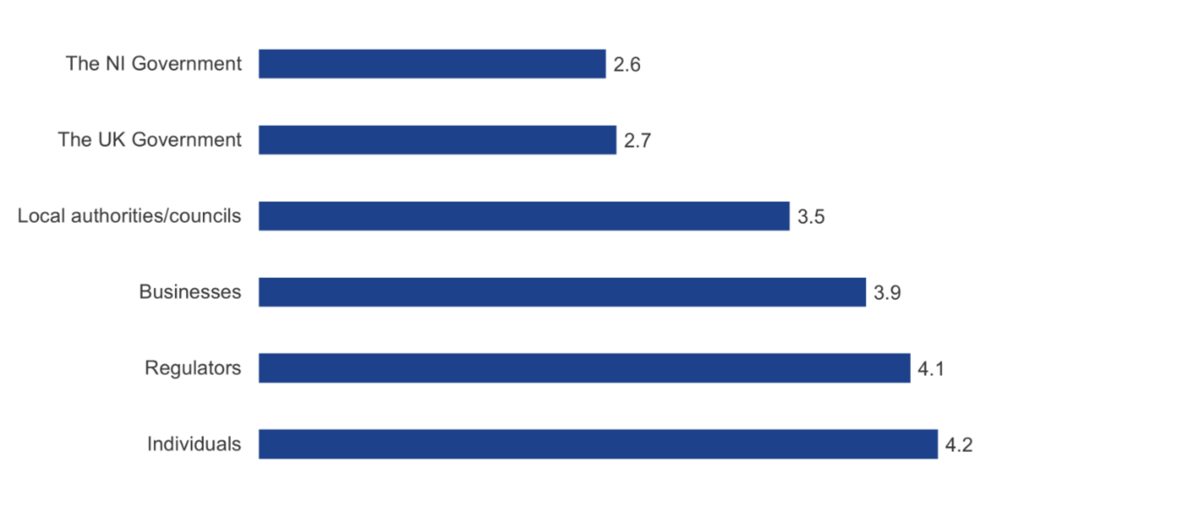
Some interviewees were less confident in their knowledge and were taking small actions to reduce greenhouse gases which were based on their limited understanding.

‘I don't fully agree that I know exactly what to do. I do my own wee personal bits and pieces just to make me feel better … but on the whole, I don't really know. I know it's environmentally detrimental for so many cars to be on the road, but at the same time driving a car is a necessity'.

3.5 Responsibility for becoming a more circular economy

Consumers were informed of the following: The circular economy is a system where materials never become waste, products and materials are kept in circulation through processes like maintenance, reuse, refurbishment, remanufacture, recycling and composting.

Figure 5



Q. Please select your answers in order of preference from 1 to 6 for who you believe should take responsibility for becoming a more circular economy?
Base: all respondents (n=1000)

On average, the NI Government was most likely to be considered the organisation which should take responsibility for becoming a more circular economy, followed very closely by the UK Government (Figure 5). Respondents were least likely on average to feel that individuals should take responsibility for becoming a more circular economy.

As with the consumer survey, interviewees were most likely to feel that the NI Government and the UK Government should take responsibility for becoming a more circular economy.

‘Local government can create initiatives and encourage people to recycle and also provide facilities to recycle.’

‘The NI Government has responsibility for overseeing and enforcing environmental policies at local government level.’

‘They [NI Government] have control of finances and should be aware of which areas need funding.’

‘The UK Government have set the overall targets for the UK to achieve, but really it's down to each of the regions to implement and put in policy procedures.’

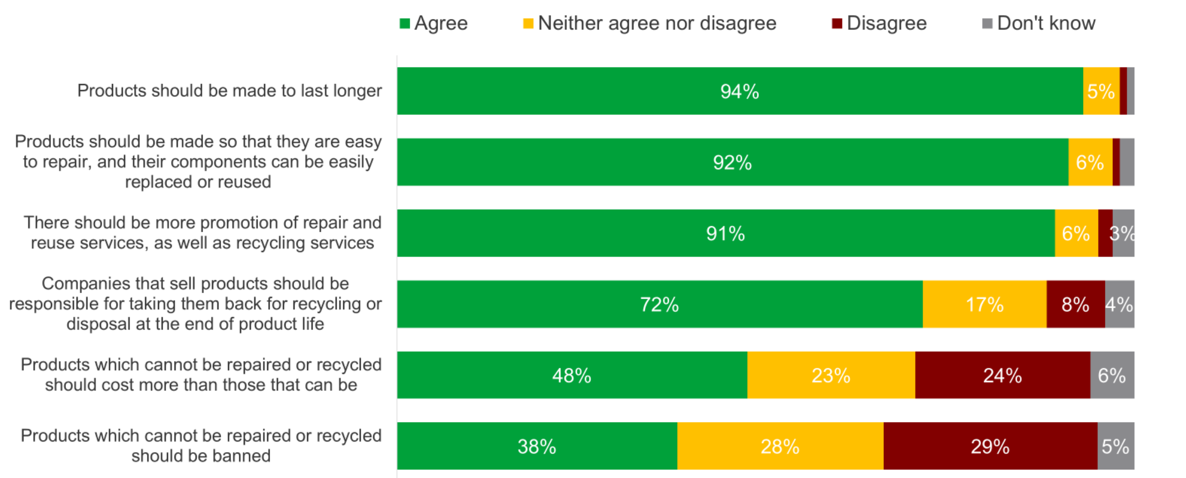
‘The UK government can pass laws to put pressure on companies to be accountable for their environmental impacts.’

‘I wouldn't have much faith in our government over here so I would say the UK Government. I don't see them putting it high enough in their priorities … I think everybody's more focused on the economy rather than the environment. I think everybody needs to buy into it, but consumers need direction.’

‘We'll [Northern Ireland] follow what the UK Government does … usually everything follows through from the UK.’

3.6 Extent of agreement regarding circular economy initiatives

Figure 6



Q. To what extent, if at all, do you agree or disagree with the following statements?
Base: all respondents (n=1000)
Note: each chart segment without a data label ≤ 2%

Around nine in ten consumers agreed that products should be made to last longer (94%), that products should be made so that they are easy to repair and their components easily replaced or reused (92%), and that there should be more promotion of repair and reuse services, as well as recycling services (91%) (Figure 6).

These sentiments were echoed amongst interviewees. Regarding products being made to last longer:

'This would reduce the consumer cycle of consistently replacing items and would contribute to sustainability.'

'This would reduce the need to purchase new products and therefore use more materials.'

'Planned obsolescence means products break and are not made to last long term, therefore making products last long term is more sustainable.'

'The likes of white goods are being made and they are given one-year warranties and guarantees on them which is ridiculous … these goods should be lasting a lot longer than a year and they should be made to a high enough standard that would give you at least 5-10 years on a product.'

In terms of products being made so that they are easy to repair:

'This will reduce waste and the dependence on materials that can be detrimental to the environment.'

'This would make it easier for people to reuse products instead of throwing them away and purchasing new things.'

'We've become too much of a throwaway society as far as products are concerned, especially white goods … there's no effort being put into repair … it's just dump, dump, dump.'

'We need to move away from this obsolete manufacturing [to a place] where things can be repaired economically by anyone. It's normally cheaper to buy something than to get it repaired.'

In relation to the promotion of repair and reuse services:

'I feel if people understand the process more or are presented with realistic ideas of how they could do this, more people would.'

'More promotion on these services will help to spread awareness on eco-consciousness, encouraging people to reduce waste.'

'I think there is probably a consumer mentality that if you do repair something, you're paying pretty much close to the full price, with no real guarantee that you are going to get the same lifetime. If I have a broken fridge and Joe comes down and says it's going to cost £250 … I know if I spend £150 more, I'll get a brand new one with a warranty, that's what [the promotion would be] fighting against.'

About seven in ten (72%) consumers agreed that companies that sell products should be responsible for taking them back for recycling or disposal at the end of product life (Figure 6). Many interviewees were less supportive of this initiative than those mentioned previously.

‘I believe there are certain laws that are already enacted inside the IT industry; it should be so more generally.’

‘But what if it's a third-party seller? Your small independent retailer wouldn't be able to do that … they have problem enough competing with the big boys. I think it should be the manufacturer who should have a scheme via the retailers.’

‘Great idea, but how practical is that going to be, really? That's a massive logistical challenge … you're talking drop-off points, you're talking increased transport, trying to get the product back to a repair hub or whatever it may be.’

‘It would be fantastic, if it’s possible. But from a business perspective, I just don't see how, logistically [it would be feasible].’

‘In some cases it may be appropriate for companies to assume responsibility for recycling, particularly when it comes to hazardous waste products but, in many cases, it could be possible to have systems in place to simplify recycle at consumer level.’

‘The buyer should be responsible unless stated otherwise.’

‘I feel individuals have their own responsibility for this once it has been purchased and companies have responsibility before the product is sold.’

Notably fewer consumers agreed with the following: that products which cannot be repaired or recycled should cost more than those that can (48%); that products which cannot be repaired or recycled should be banned (38%) (Figure 6).

Many interviewees were sceptical about these initiatives. Regarding an increased cost for products which cannot be repaired or recycled:

‘Due to the cost of living crisis, it would be unfair on families who struggle; they may morally want to recycle and repair, but if faced with a financial barrier they may have no choice.’

‘In some cases it may not be possible to produce a product which can be repaired or recycled in which case penalising on cost would be unfair.’

‘With the current cost of living crisis, it would be hard to justify this.’

In relation to banning products which cannot be repaired or recycled:

‘There will always be instances where something is required, but the reason it is required makes it unsuitable to recycle or reuse.’

‘That's a bit strong. What if you need it? Take a nail, for example … that's a product it's highly unlikely you will be able to repair.’

‘I feel this is unrealistic in the society that we live in.’

‘This seems a little extreme.’

3.7 Environmental actions doing/would consider doing

Around two-thirds (67%) of consumers were already repairing goods when worn or broken, with a further 26% stating this is something that they would consider doing (Figure 7). Amongst the interviewees who were not taking this action, a lack of information, cost implications and time limitations were some of the reasons preventing them from doing so.

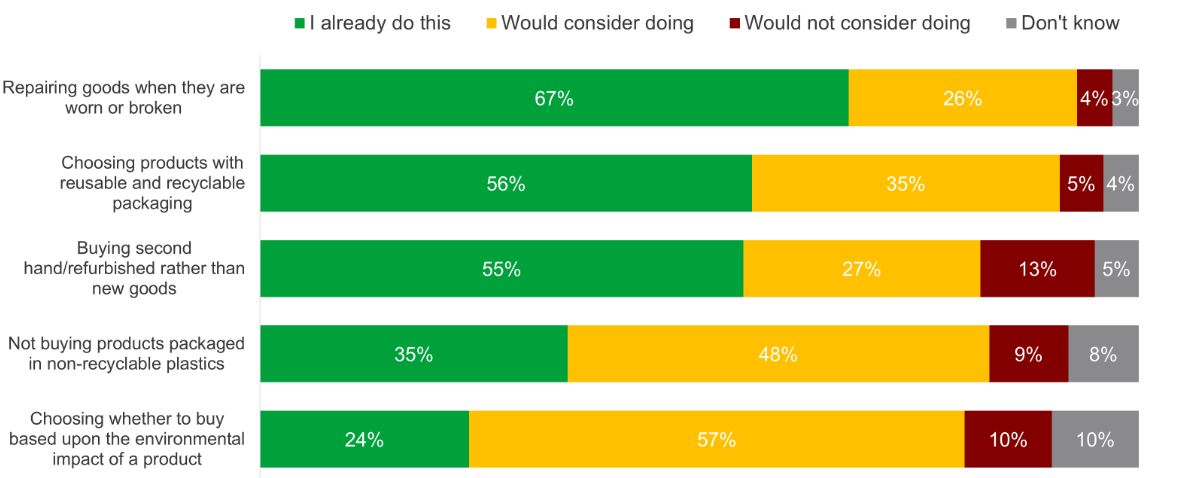
‘It would be easier if there was more information on how this could be done.’

‘Unfortunately, I don’t have the skills to repair things myself and have found that a lot of the time, repairs can cost more than actually buying the same product new.’

‘I do this but not always. I am a busy working mum and don’t always have the time to try and repair things myself or try to find someone who can repair for me.’

Close to three in five consumers were already choosing products with reusable and recyclable packaging (56%), with a similar number (55%) already buying second hand/refurbished rather than new goods; a further 35% and 27%, respectively, would consider these actions (Figure 7).

Figure 7



Cognisense Q. Below are some of the things that people do on environmental grounds. For each one, please state whether you already do this, and if not, whether you would consider doing it in future.
Base: all respondents (n=1000)

For some interviewees, products with reusable and recyclable packaging would only be considered if the cost was equitable with less environmentally-friendly options.

‘When presented with a similar product at a similar price, I would choose recyclable and re-usable products to help reduce waste.’

‘Would maybe consider doing this in future. It would be cost-dependent … if it was significantly more expensive, I probably would not.’

For many of the interviewees who already buy second hand/refurbished goods, price plays an important role in their decision to do so.

‘I do this quite a lot. I enjoy reusing and saving money where I can and in turn helping the environment.’

‘I do this but mainly for the money-saving benefits, if I’m honest.’

‘This would be cheaper and more sustainable. Wouldn’t do it for everything, but for some things like furniture and clothes I would.’

‘Would do this as I feel that you can often get the same or a very similar product at a better price while helping the environment through waste reduction.’

Notably fewer consumers were already doing the following: not buying products packaged in non-recyclable plastics (35%); choosing whether to buy a product based upon the environmental impact of a product (24%) (Figure 7). However, 48% and 57%, respectively, would consider taking these actions.

Some interviewees suggested that they would need more information before they could take these actions.

‘It's very hard as a consumer to know if the packaging is recyclable or non-recyclable … it's hard to know until you've bought it.’

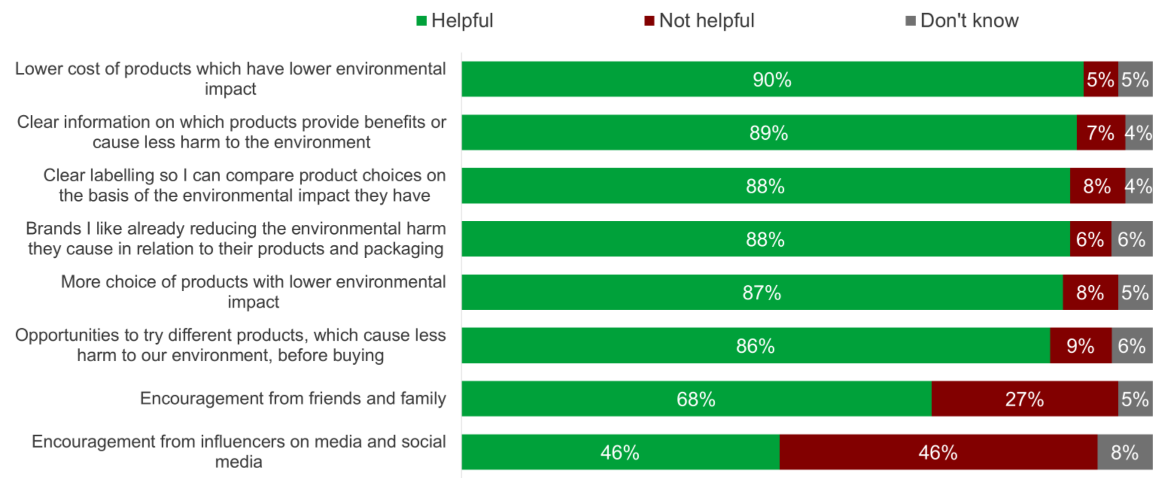
‘To be honest with you, I wasn't even fully aware that some plastics were non-recyclable and it's not something I look for in the supermarket.’

‘Would consider doing this in the future if there was more promotion/information in stores as to what items are environmentally friendly.’

‘I would consider doing this if the environmental impact was highlighted.’

3.8 Helpfulness of initiatives to reduce the negative impact household items might have on the environment

Figure 8

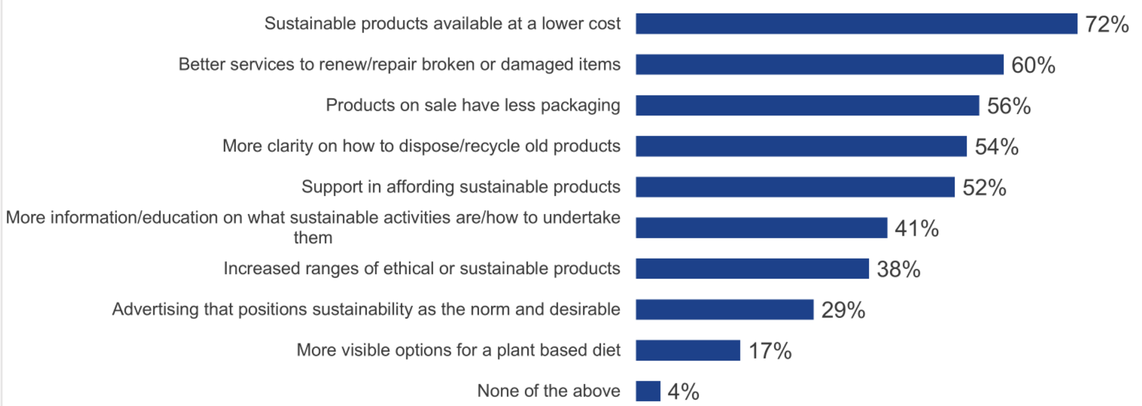


Cognisense **Q. Thinking about the household items that you buy, how helpful would each of the following options be to enable you to reduce the negative impact they might have on the environment? *Base: all respondents (n=1000)***
Note: a chart segment without a data label ≤ 2%

With the exception of encouragement from friends and family (68%) and encouragement from influencers on media and social media (46%), all of the initiatives suggested were considered helpful by around nine in ten consumers (Figure 8). However, a lower cost for products which have a lower environmental impact (90%) was more likely to have been considered very helpful than the other initiatives.

3.9 Things that would encourage the adoption of a more sustainable lifestyle

Figure 9



Cognisense **Q. Which of the following, if any, do you think would encourage you to adopt a more sustainable lifestyle?**
Base: all respondents (n=1000)

Sustainable products available at a lower cost (72%) would be more likely than any of the other options to encourage the adoption of a more sustainable lifestyle (Figure 9). More visible options for a plant-based diet (17%) would be least likely by a considerable margin to encourage the adoption of a more sustainable lifestyle.

Amongst interviewees, a lower cost for sustainable products would be particularly encouraging in the challenging economic climate.

'Budget is important to me, so this will encourage me to have a more sustainable lifestyle.'

'This is hugely important due to the current financial situation … preventing financial barriers would encourage more people to engage in the correct behaviours in regard to consumption of environmentally-friendly products.'

'Price affects purchasing habits, so if it was cheaper it would motivate me.'

'Cost is a determining factor in product selection so if this is reduced for sustainable products, they would be more desirable.'

'Price comes into everything so this would help. I am never going to spend more than I need to.'

Many interviewees suggested that they would be encouraged to adopt a more sustainable lifestyle if they had clarity on how to dispose/recycle old products.

'This would encourage me as I would be more educated on the matter and therefore understand more why it is important.'

'Anything that makes life easier and helps me do things properly. I'm sure I am not recycling properly … I need someone to remind me how.'

'Knowing exactly how and where to dispose/recycle products would encourage me to do it more. Not knowing leads to disposing incorrectly/not recycling and then what's the point?'

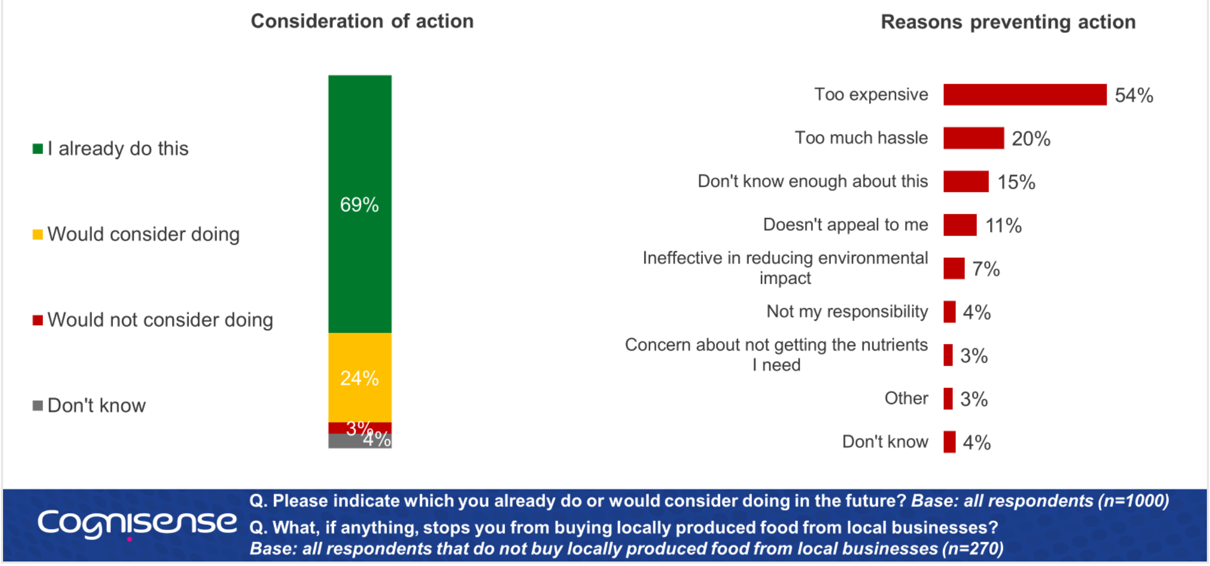
'Increasing the education on the subject makes it easier to recycle because you know more about how to do it.'

'Yes this is important because I have found myself binning things if I am not sure what to do with them.'

'Taking the example of packaging, it is confusing as to what can be recycled, what can't, and how much work I have to do in order to be good at recycling. What isn't recyclable? Where can I take something where I know someone is going to correctly dispose of it rather than just put it into landfill?'

3.10 Buying locally produced food from local businesses

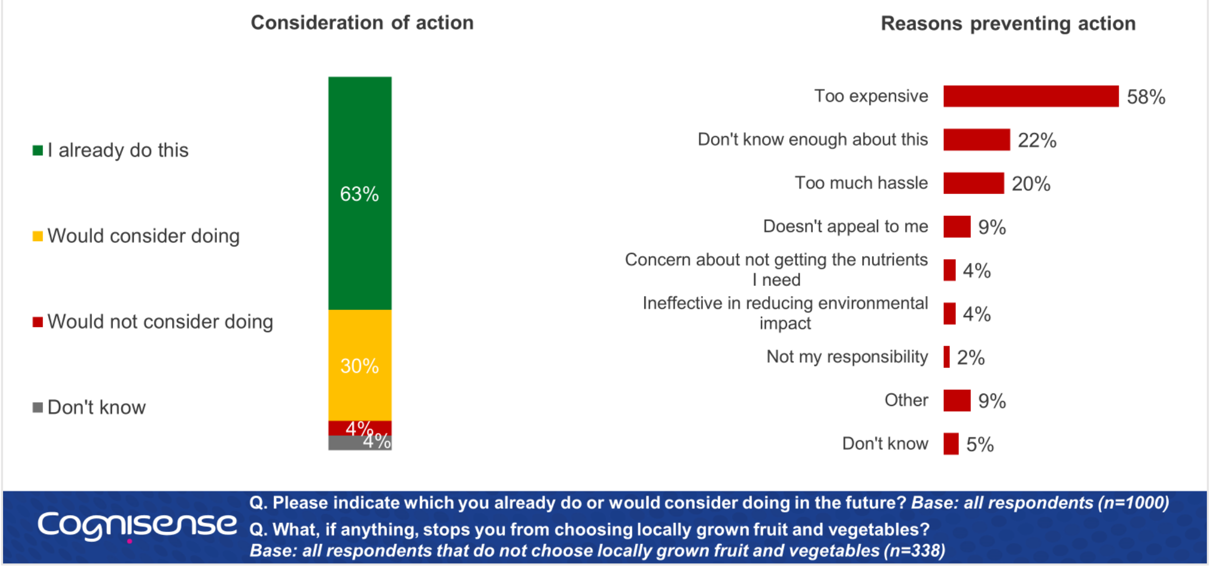
Figure 10



Close to seven in ten (69%) consumers were already buying locally produced food from local businesses, whilst a further 24% stated that they would consider doing so (Figure 10). Amongst those not taking this action currently, the expense involved (54%) was most likely to have been the reason.

3.11 Choosing locally grown fruit and vegetables

Figure 11



Around three in five (63%) consumers were already choosing locally grown fruit and vegetables, with a further 30% stating that they would consider doing so (Figure 11). Amongst those not taking this action currently, the cost involved (58%) was most likely to have been the reason.

Cost was also an influential factor amongst interviewees.

'Would consider it more seriously if more competitively priced.'

'I'd like to do more. I feel that our commercial market and the cost associated with food purchasing is forcing me towards more cost-effective non-locally produced food.'

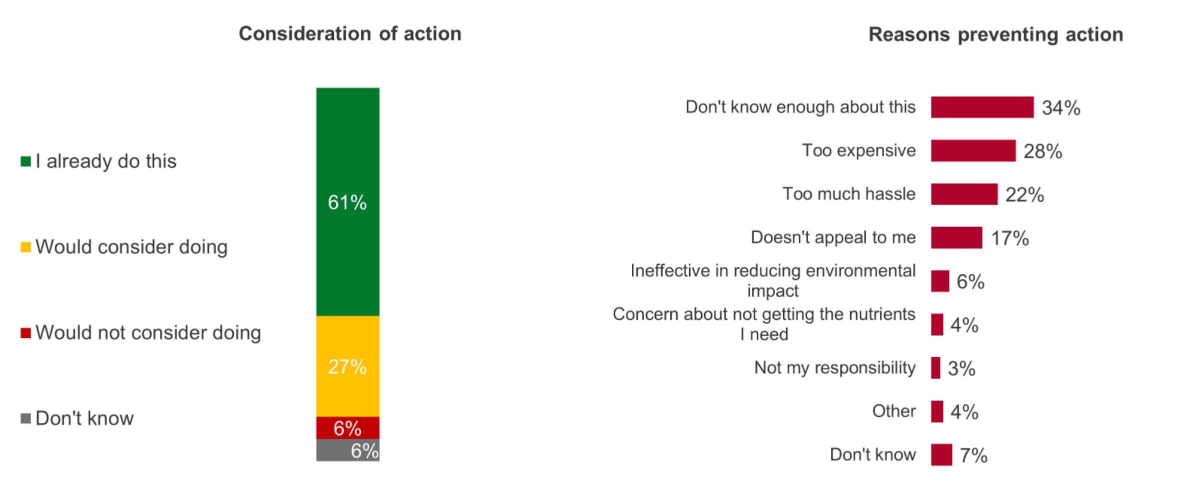
I would far rather buy products that are local here, compared to something that's been shipped from abroad.'

'I would like to use more locally sourced products and help the economy but sometimes the purse strings take over.'

3.12 Selecting food that is in season

About three in five (61%) consumers were already selecting food that is in season, whilst a further 27% stated that they would consider doing so (Figure 12). Amongst those not taking this action currently, a lack of knowledge (34%) was the main reason for not doing so, followed by the expense involved (28%), the hassle (22%), then the lack of appeal (17%).

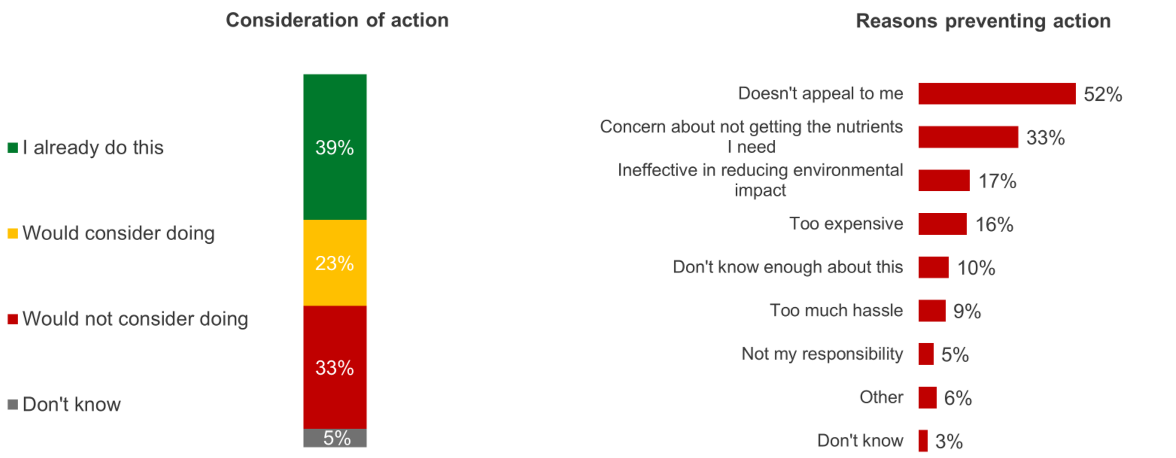
Figure 12



Cognisense Q. Please indicate which you already do or would consider doing in the future? *Base: all respondents (n=1000)*
Q. What, if anything, stops you from selecting food that is in season?
Base: all respondents that do not select food that is in season (n=332)

3.13 Reducing the amount of red meat eaten

Figure 13



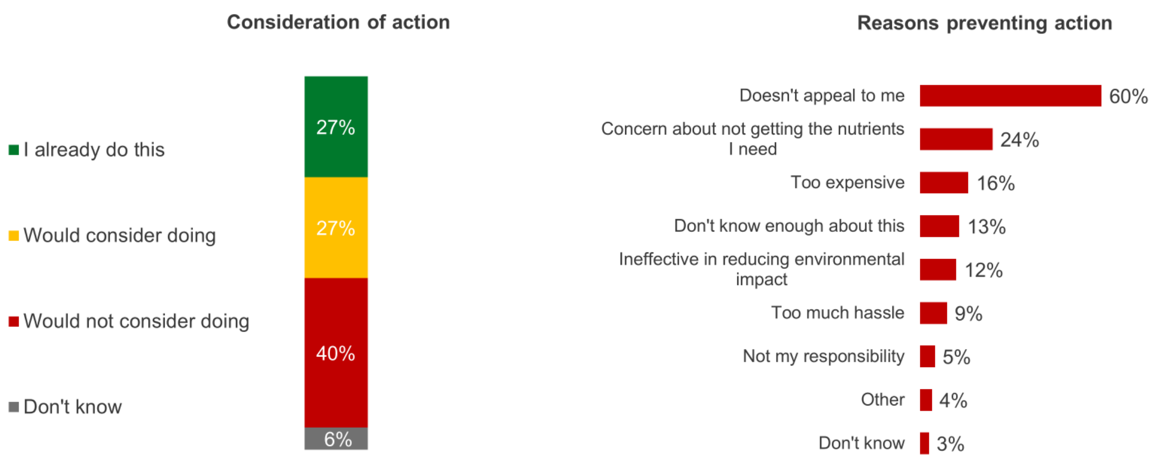
Cognisense Q. Please indicate which you already do or would consider doing in the future? *Base: all respondents (n=1000)*
Q. What, if anything, stops you from reducing the amount of red meat eaten?
Base: all respondents that have not reduced the amount of red meat eaten (n=551)

Around two in five (39%) consumers were already reducing the amount of red meat eaten, whilst a further 23% stated that they would consider doing so (Figure 13).

Amongst those not taking this action currently, a lack of appeal (52%) was the main reason for not doing so, followed by concern about not getting the nutrients needed (33%), a feeling that this action is ineffective in reducing environmental impact (17%), then the cost involved (16%).

3.14 Reducing dairy consumption

Figure 14



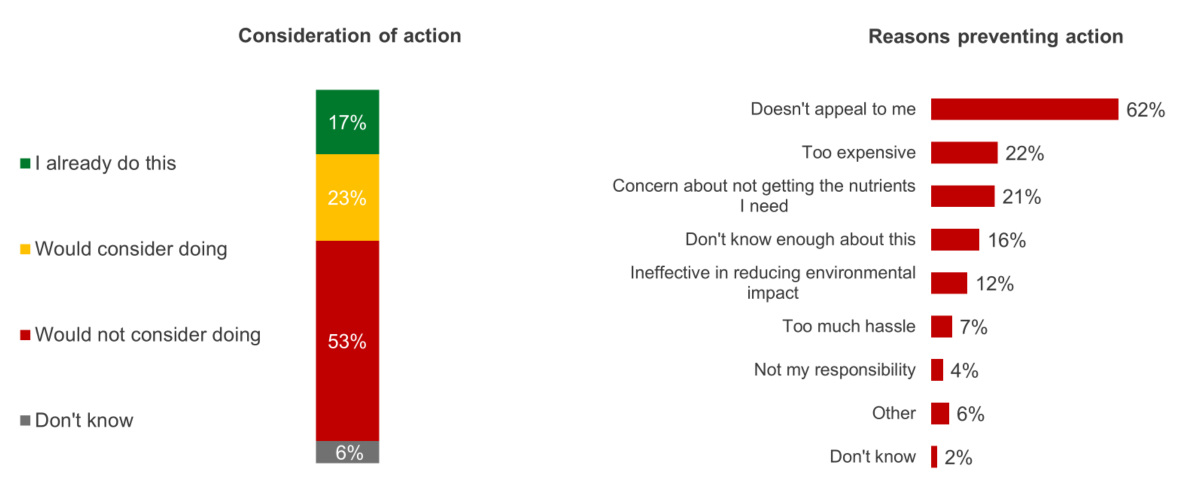
Cognisense Q. Please indicate which you already do or would consider doing in the future? *Base: all respondents (n=1000)*
Q. What, if anything, stops you from reducing dairy consumption?
Base: all respondents that have not reduced dairy consumption (n=667)

Almost three in ten (27%) consumers were already reducing their dairy consumption, with the same number (27%) stating that they would consider doing so (Figure 14). Amongst those not taking this action currently, a lack of appeal (60%) was the main reason for not doing so, followed by concern about not getting the nutrients needed (24%), then the cost involved (16%).

3.15 Switching to dairy substitutes

About a fifth (17%) of consumers had already switched to dairy substitutes, whilst a further 23% stated that they would consider doing so (Figure 15). Amongst those not taking this action currently, a lack of appeal (62%) was the main reason for not doing so, followed by the expense involved (22%), concern about not getting the nutrients needed (21%), then a lack of knowledge (16%).

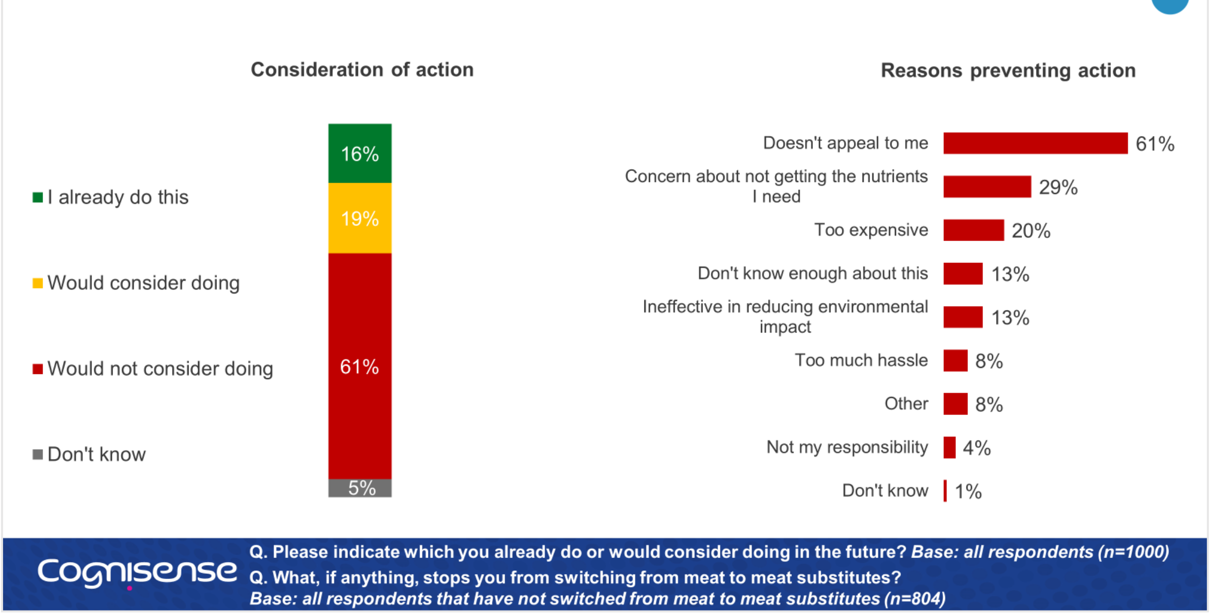
Figure 15



Q. Please indicate which you already do or would consider doing in the future? *Base: all respondents (n=1000)*
Q. What, if anything, stops you from switching from dairy to dairy substitutes?
Base: all respondents that have not switched from dairy to dairy substitutes (n=786)

3.16 Switching to meat substitutes

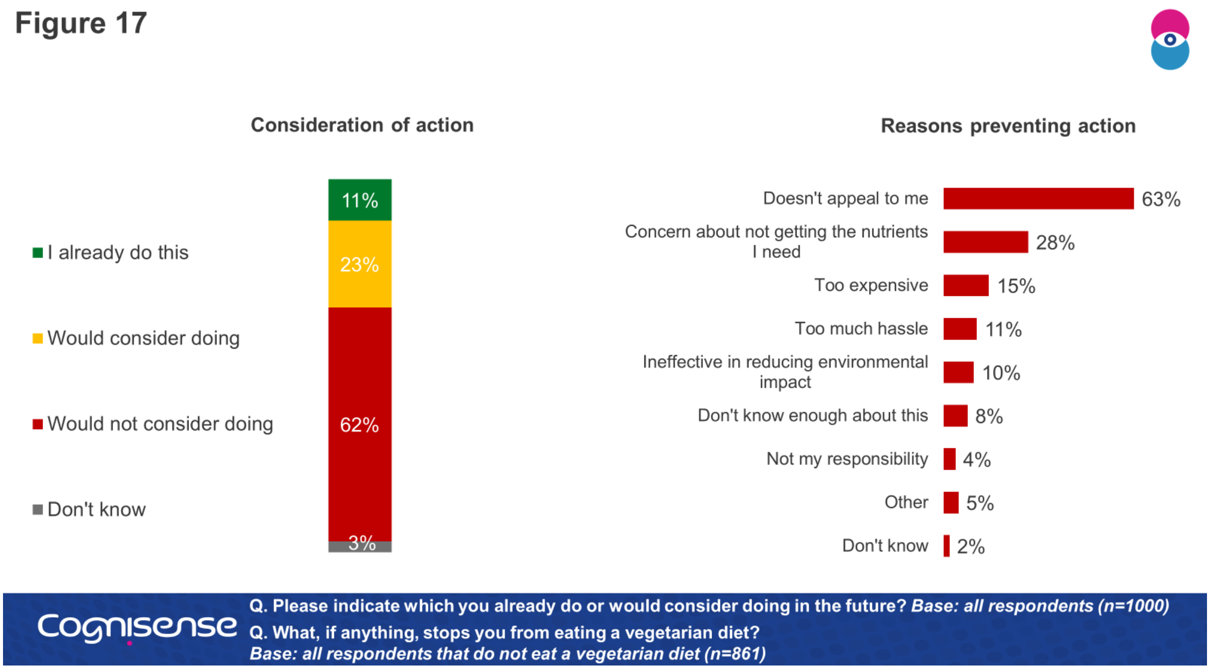
Figure 16



Close to a fifth (16%) of consumers had already switched to meat substitutes, with a further 19% stating that they would consider doing so (Figure 16). Amongst those not taking this action currently, a lack of appeal (61%) was the main reason for not doing so, followed by concern about not getting the nutrients needed (29%), then the cost involved (20%).

3.17 Eating a vegetarian diet

Figure 17



About one in ten (11%) consumers were already eating a vegetarian diet, whilst a further 23% stated that they would consider doing so (Figure 17). Amongst those not taking this action currently, a lack of appeal (63%) was the main reason for not doing so, followed by concern about not getting the nutrients needed (28%), then the expense involved (15%).

Similar sentiments were evident amongst interviewees who did not eat a vegetarian diet.

'It's not something I would consider as I enjoy a balanced diet of both meat and veg.'

'I think it is a Northern Irish or an Irish or British thing that whenever I think of dinner, I think of meat, with either spuds or some type of carb.'

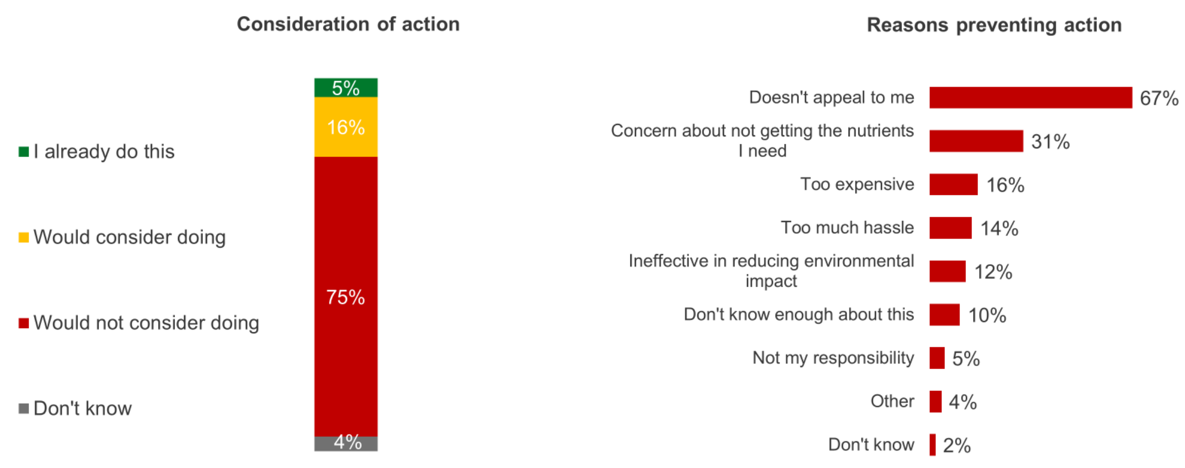
'From a personal health perspective, I can see the benefits of increasing the vegetable content of my diet, but from a sustainability perspective I believe that some of the arguments around it are flawed and therefore I'm not totally convinced that just because it's vegetarian makes it greener.'

'In terms of diet, I would worry I wasn't getting the nutrients I needed as a gym user. I like to hit my protein target and a lot of this is through red meat and other meats and dairy. Following a vegan or vegetarian diet would not interest me.'

3.18 Eating a vegan diet

About one in twenty (5%) consumers were already eating a vegan diet, whilst a further 16% stated that they would consider doing so (Figure 18). Amongst those not taking this action currently, a lack of appeal (67%) was the main reason for not doing so, followed by concern about not getting the nutrients needed (31%), then the cost involved (16%).

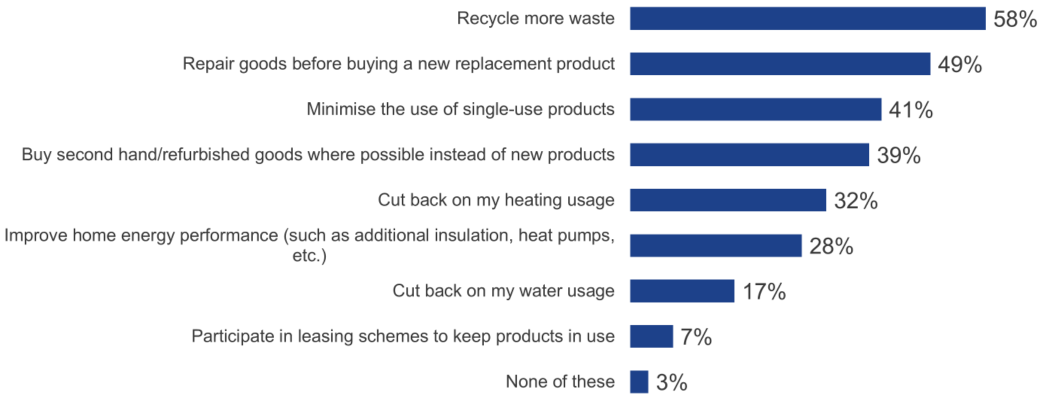
Figure 18



Cognisense Q. Please indicate which you already do or would consider doing in the future? *Base: all respondents (n=1000)*
Q. What, if anything, stops you from eating a vegan diet?
Base: all respondents that do not eat a vegan diet (n=926)

3.19 Things most likely to do to help reduce environmental impact

Figure 19



Cognisense

Q. Thinking about things you could personally do in order to help reduce environmental impact, from this list, which three things would you be most likely to do?
Base: all respondents (n=1000)

Recycling more waste (58%) was the action consumers were most likely to take to help reduce environmental impact, followed by repairing goods before buying a new replacement product (49%), minimising the use of single use products (41%), then buying second hand/refurbished goods where possible instead of new ones (39%) (Figure 19).

Considerably fewer consumers stated that they were likely to do the following: cut back on heating usage (32%); improve home energy performance (28%); cut back on water usage (17%); participate in leasing schemes to keep products in use (7%).

4. Contact information

If you have any questions, require further information or wish to discuss any aspect of this research, please contact:

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