



Reflecting Ireland

Sustainability - November 2023

An insight into consumer behavioural change in Ireland

Find out more:
ptsb.ie/blog

ptsb

Contents

3 Executive summary

Sustainability

- 4 On the brink – concern about climate change remains high
- 5 What concerns us most is what we can see and feel
- 6 Confidence about avoiding the worst is mixed
- 7 We believe industry now has a more important role to play
- 8 Fear of higher costs is getting in the way of action
- 9 More of us are changing our behaviour to live more sustainably
- 11 We are divided on willingness to pay more for green
- 12 Taxes and levies as a policy response are not widely loved
- 13 Subsidies, incentives and tax relief schemes see strong support
- 14 The areas we are most willing to change our behaviour
- 15 Most of us feel we could do more to reduce our impact

The National Picture

- 16 Cost of living continues to dominate our concerns
- 17 Our view on the Irish economy
- 18 How we describe our personal finances
- 19 What do we feel about living in Ireland today?
- 20 A regional perspective on climate change
- 21 Methodology

Executive summary

Climate change and its impact have been a regular feature on the global news agenda for the best part of a decade. In 2023, the effects of climate change remain a concern for our nation. But over the last few years, financial and health concerns have dominated our TV and phone screens as well as our airwaves pushing climate change down on the agenda.

Over the last two editions of Reflecting Ireland, we had been seeing signs of slowly gaining optimism around our financial outlook, but we are now seeing a very slight dip in sentiment as we head into autumn. Cost-of-living is by far the most pressing issue for Irish people, with climate change remaining important but somewhat overshadowed. As Irish people struggle with managing their budgets, how will this impact our efforts to buy and behave more sustainably?

Climate change concern

- 7 in 10 are concerned about climate change. Males have a higher level of concern than their female counterparts and this concern among males has risen significantly since 2021.
- Across the age groups, younger and older cohorts have higher levels of concern about climate change, with a dip in concern levels seen amongst those between 25-44 years.
- A quarter say we are on the brink of irreversible climate change with similar numbers saying they are doing all they can to reduce their carbon impact.
- Increased extreme weather events is the most concerning effect of climate change, particularly for the older age groups.
- Fossil fuels are considered the largest household contributor to climate change.

Tackling climate change

- Increasing solar energy is perceived as the primary solution to tackle climate change, followed by increased wind farms and public transport in rural locations.
- 7 in 10 believe those in power (domestically and abroad) should be doing more. Similar numbers agree that infrastructure for electric cars is lacking.
- Subsidies, incentives and tax relief are seen as the most beneficial policy responses to help tackle climate change. 8 in 10 agree subsidies should be given for energy-efficient homes.
- Workplace environmental credentials are important for 2 in 5 of those aged 18-24, suggesting this will be an important differentiator for attracting Gen Z talent into the future.
- Just over a quarter are willing to pay more taxes to support green initiatives.
- On average 2 in 5 claim they will pay extra for products and services with green credentials. Food and drink and vehicles are the sectors that the public are most likely to pay for.

Behaviours, actions and challenges to living sustainably

- 2 in 3 are willing to retrofit their house with assistance, but only 1 in 5 are willing to do the same at their own expense.
- 2 in 3 believe that their household is already doing all it can to reduce its carbon footprint.
- Reducing clothing and food purchases as well as buying more locally produced food and drink are considered the easiest sustainable actions to commit to. Reducing fossil fuels for heating and reducing time on electronics are seen as the hardest.
- One-third say they are likely to buy an electric vehicle over the next three years – mainly driven by environmental reasons. The same number say they are likely to install solar panels. This however is more likely to be driven by perceived cost-savings.

On the brink – concern about climate change remains high

Of the 7 in 10 (69%) that are concerned about climate change, almost 1 in 4 (23%) are very concerned. Climate change scepticism is not significant in Ireland with only 4% saying they are not at all concerned.

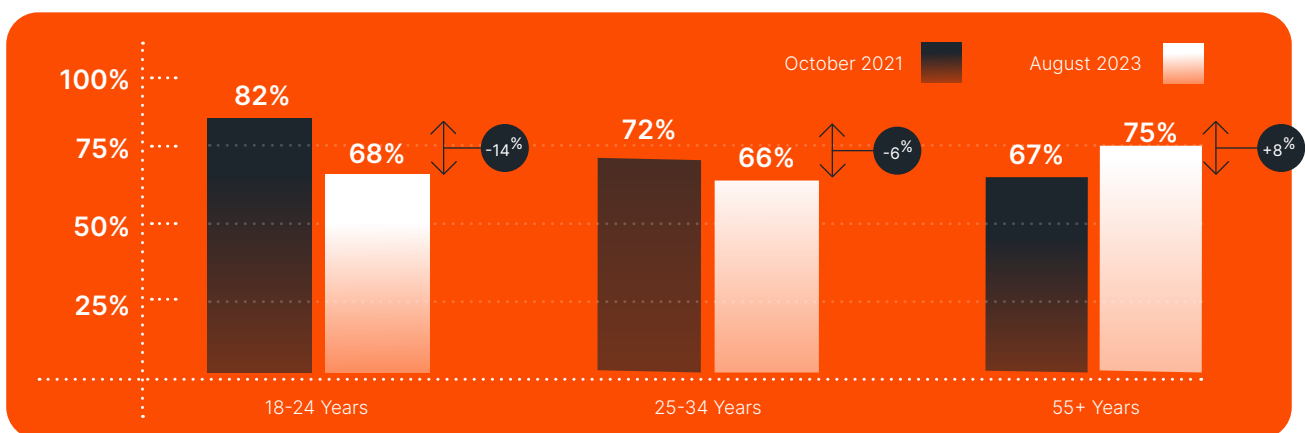


The picture has hardly changed since 2021. We remain now as we were then quite concerned about the effects of climate change. Men (73%) are more likely than women (66%) to be concerned about climate change, while those over the age of 55 (75%) are more concerned than their younger counterparts aged 18-24 (68%)

A reverse in which age groups are most concerned about climate change

Since our previous report on climate change and sustainability in October 2021, we have seen a noticeable change in the degree of concern felt by younger and older age groups. Those aged 18-24 show relatively less concern than was the case in 2021. At the other end of the age spectrum, those aged 55+ are more concerned now than in 2021.

Younger adults are more likely to be informed about climate change initiatives such as COP 2028, the UN Conference on Climate Change. One in four of the under 35s are moderately or extremely familiar with it compared to 1 in 5 of those aged 55+.



1 in 4 believe we are on the brink of irreversible climate change

This is felt most keenly by those aged 45-54, a third of whom feel this way (33%), and to an extent by those aged 18-24 (28%) and ABC1s (28%). There is evidence of a link between feeling we are on the brink and behaviour. Of those that say they are doing a lot to reduce their carbon impact, 40% believe we are on the brink. On the other hand those that are not doing a lot to reduce their carbon impact, are much less likely to believe that we are on the brink (7%).



What concerns us most is what we can see and feel

Extreme weather is the cause of most concern

One in four are most concerned by the increase in extreme weather events (26%) which have undoubtedly been more visible over recent months. Thirteen percent of us are concerned by the health risks such extreme events pose. One in five are most concerned by possible increases in the cost of living brought about by adopting to climate change (18%).



We are less concerned by things we cannot easily see, such as biodiversity loss (5%) or risks that feel remote to us, such as wildfires (4%) or drought (3%). Interestingly, those aged 18-24 are twice as likely vs. average to be concerned about biodiversity loss (11% vs. 5%) and rising sea levels (19% vs. 8%). This may reflect an interest among some young people in the recent Children and Young People's Assembly on Biodiversity Loss.

Concern about extreme weather events and associated health risks increases with age

One in five of those aged 18-24 are concerned about extreme weather, rising to 1 in 3 among those aged 55+:

Age group	Concerned about extreme weather events	Concerned about associated health risks
18-24	19%	11%
25-34	21%	11%
35-44	25%	12%
45-54	28%	13%
55+	31%	14%
Average	26%	13%

Confidence about avoiding the worst is mixed

While 4 in 10 have no confidence in avoiding the worst effects of climate change, 6 in 10 express some level of confidence. This varies from extreme to slight in our ability to mitigate the worst effects. Only 3% are extremely confident.

Level of confidence diminishes with age

While almost 1 in 3 of 18-24 year olds have no confidence in our ability to mitigate the worst effects, this increases to 1 in 2 among those aged 55+. This suggests a growing pessimism among older adults about our ability to overcome the challenge facing us.



% no confidence in our ability to mitigate the worst effects of climate change by 2030

The majority believe regulators and larger countries need to step up

Over 7 in 10 believe regulators should do more to check green credentials and a similar number believe larger countries need to step up. The older we are, the more likely we are to agree with these sentiments. Two thirds of younger adults agree, increasing to three quarters among those aged 55+.

Age group	Bigger countries need to step up	Regulators should do more to check green credentials
18-24	65%	64%
25-34	72%	68%
35-44	71%	68%
45-54	75%	72%
55+	75%	76%
Average	73%	71%



We believe industry now has a more important role to play

In 2023 we attribute an equal share of responsibility for addressing climate change to government, industry and individuals, 20% in each case. In 2021, we attributed less to industry (16%) and more to government (27%) and individuals (23%).

The industries we see as having the most impact on the climate are transport, energy and the airline industry

We believe transport (51%), energy (50%) and the airline industry (47%) have the most significant impact on climate, and that these are the top areas to tackle climate change. Approximately a third see agriculture (35%), the motor industry (33%) and data centres (29%) as having a significant impact. Our ranking of industries impacting the climate has not changed since 2021; transport topped the list then as now. However there has been an increase in those who believe the energy industry (+7%) and data centres (+7%) are most impactful, and a reduction in those that believe agriculture (-8%) is.

We see energy, agriculture and transport as leading the way in tackling climate change

Half of us (49%) believe energy companies are leading the way in tackling climate change, while a third believe agriculture (35%) and transport (34%) are doing so. In 2021, we ranked the same three industries as leading the way, although there has been a slight decrease in those who feel the energy industry is leading the way (-6%) and a slight increase in those that believe agriculture is (+4%).

Younger people attribute more climate impact to the motor and fashion industries, older people attribute more impact to airlines

Those aged 18-24 are almost twice as likely as those aged 55+ to associate the motor industry with climate change impact, and over three times as likely to associate the fashion industry with it. Over 50% of those aged 55+ link the airline industry to climate change compared to 41% of those aged 18-24.

Industries that impact climate change most in Ireland today

	Airline	Motor	Fashion
18-24	41%	43%	32%
25-34	38%	40%	19%
35-44	45%	38%	18%
45-54	51%	31%	13%
55+	52%	23%	9%
Average	47%	33%	16%

Fear of higher costs is getting in the way of action

When it comes to taking action, 7 out of 10 believe higher cost is the main barrier. Other barriers to living more sustainably include the perceived effort involved, lack of knowledge or information overload, each a barrier for 1 in 5. Fear of higher costs however stands at more than three times that level.



Fear of higher costs increases with age. Other barriers including perceived effort, lack of knowledge or information overload, decline with age

Overall, 7 out of 10 (68%) believe that trying to be environmentally friendly will cost them money. Fear of higher costs is the greatest barrier to living more sustainably, particularly for older adults. Perceived effort, lack of knowledge or information overload are less significant and fade with age.

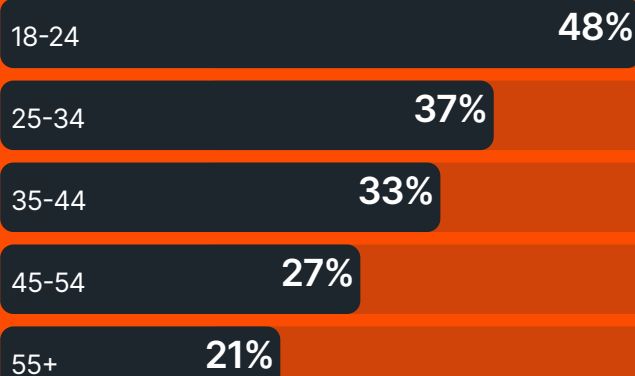
Perceived barriers to living more sustainably

Age group	High cost	Information overload	High effort	Lack of knowledge
18-24	56%	30%	34%	31%
25-34	64%	25%	23%	21%
35-44	68%	22%	18%	16%
45-54	76%	14%	16%	14%
55+	72%	18%	13%	18%
Average	69%	21%	19%	19%

Some feel the rising cost of living has led them to live more sustainably. Others, particularly younger people, feel it has had the opposite effect

Almost half (45%) believe that the higher cost of living has driven them to live more sustainably, and this increases to 58% among those who feel they are doing a lot to reduce their carbon footprint. On the other hand, almost a third (30%) believe the cost of living causes them to live less sustainably, rising to almost 1 in 2 (48%) among younger adults and falling to 21% among those aged 55+.

% agree the cost of living is causing them to live less sustainably:





When we look at people’s behaviour over the last three months there is evidence of an increase in sustainable behaviour compared to 2021.

More people are making an effort to use up leftover food; 7 in 10 in 2023 up from 6 in 10 in 2021. More people are walking or choosing public transport over private; 4 in 10 in 2023 compared to 3 in 10 in 2021. More people are choosing locally made food or drink over imported; almost 3 in 10 in 2023 up from 2 in 10 in 2021. There has also been an increase in those buying second hand items instead of new, from 30% in 2021 to 35% in 2023.

The opportunity to save money is the driving force behind changes in everyday behaviour

Apart from choosing locally made food or drink or replacing meat in a main meal, the strongest motivation for these behaviours has been to save money rather than save the planet. The motivation to save money can be almost twice as powerful as the motivation to combat climate change.

Behaviour last 3 months		Motivation	
	% last 3 months	Combat climate change	Cut down cost
Made an effort to use up leftover food	68%	35%	65%
Substituted public transport/walking instead of private transport	42%	39%	61%
Bought second hand items instead of new	35%	36%	64%
Substituted locally made food or drink for imported	30%	61%	39%
Replaced meat in a main meal	29%	53%	47%
Consciously spent less time on electronic devices	26%	47%	53%



Saving money is also a powerful motivator when planning for big ticket items

When it comes to planned investments over the next 3 years, approximately a third say they intend to retrofit their home or buy a hybrid or electric vehicle. This has changed little since 2021. When planning home improvements, the opportunity to save money over the long-term is a powerful force. It is twice as motivating as combatting climate change in the case of installing solar panels or retrofitting a home, and one and a half times as motivating in the case of installing a heat pump. Combatting climate change is a stronger motivator for buying a hybrid or electric vehicle, although the long-term cost savings carry almost equal weight in motivational appeal.

Intended behaviour next 3 years		Motivation	
	Likely next 3 years	Combat climate change	Save money
Install solar panels	33%	20%	42%
Buy a hybrid or electric vehicle	33%	33%	27%
Retrofit home	31%	22%	44%
Install a heat pump	24%	27%	39%

We are divided on willingness to pay more for green

While over a quarter (27%) are willing to pay more tax for green initiatives, almost half (46%) are not. This shows a slight reduction (-5%) in those willing to pay more tax to support green initiatives since 2021.

Of the 27% that are willing to pay, only 8% are strongly committed. Four in ten (39%) say they are willing to pay more for green products, with again 8% strongly committed, however almost a third (32%) say they would not be willing to.

A higher percentage are willing to change to brands that tackle climate change, almost 1 in 2 (46%). However only 12% are strongly committed, and a quarter (25%) would not be willing to. Younger age groups are more likely to support paying extra tax for green initiatives or products than older.

Age group	I am willing to pay more tax for green initiatives	I am willing to pay more for green products
18-24	36%	46%
25-34	29%	40%
35-44	26%	40%
45-54	23%	32%
55+	24%	38%
Average:	27%	39%



Those most concerned about the cost of living are understandably the least willing to pay more for green

Those that are concerned about the cost of living are less likely to pay more taxes to support green initiatives (-7% vs. average), switch to greener brands (-6% vs. average) or pay more for green products (-5% vs. average). They are also less prepared to invest in big ticket items; to pay for a home retrofit (-6% vs. average) or for an electric vehicle (-6% vs. average).

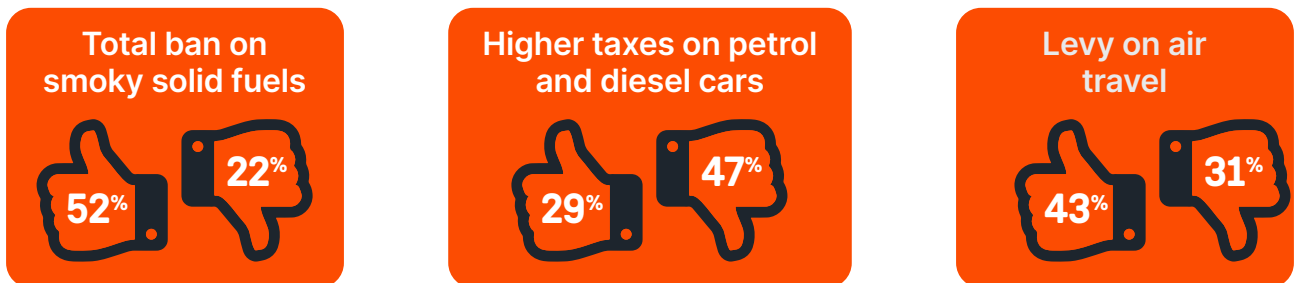
Just over 1 in 10 (12%) of those that are concerned about climate change are worried about an increase in the cost of living associated with combatting climate change. However that triples to over 3 in 10 (34%) among those that are unconcerned about climate change.

Taxes and levies as a policy response are not widely loved

Taxes and levies are divisive; supported by some, resisted by others

While just over a third (36%) agree that increased carbon taxes are necessary to get us to change, a similar proportion (37%) disagree, showing that taxes and levies can be divisive. This pattern remains unchanged since 2021. Over 1 in 2 (52%) support a total ban on smoky solid fuels, however over 1 in 5 (22%) are against. Similarly while 43% support a levy on air travel, 31% are against.

For and against support for taxes and levies



The greatest resistance is to an increase in taxes on petrol and diesel cars, supported by 29%, a decline of -14% since 2021, and resisted by 47%. Support is higher among young adults and declines with age.

Support for higher taxes on petrol and diesel cars:



Subsidies, incentives and tax relief schemes see strong support

Eight out of ten (80%) support subsidies for energy efficient homes, a similar number (77%) support subsidised public transport, over 7 out of 10 (73%) support lower taxes on less carbon intensive food products and a similar number (69%) support more incentives to buy electric vehicles. Support for such initiatives in energy, transport and food increases with age while enthusiasm for incentives to buy electric vehicles is similar across all age groups.

Age group	Subsidies for energy efficient homes	Subsidised public transport	Lower taxes on less carbon intensive food products
18-24	65%	61%	60%
25-34	78%	72%	71%
35-44	80%	78%	74%
45-54	81%	79%	78%
55+	84%	83%	77%
Average	80%	77%	73%

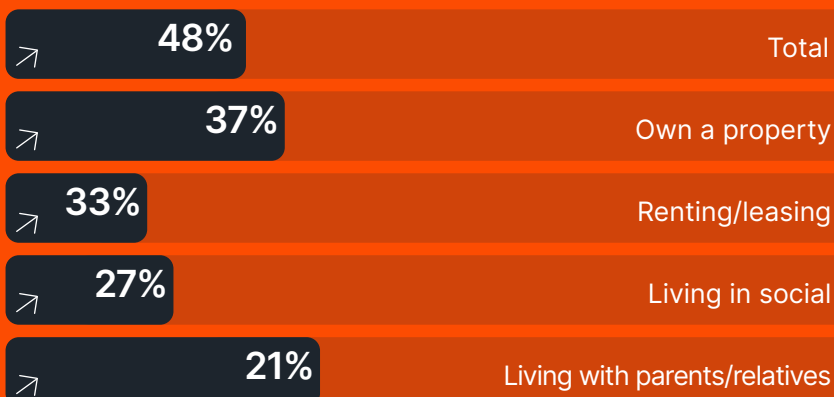
Government supports plays a significant role in encouraging home retrofits

While 1 in 5 (20%) are prepared to retrofit their homes at their own expense, intention more than trebles to 65% if government assistance is made available. Indeed a similar proportion (70%) believe it is government's responsibility to retrofit homes, an increase of +7% since 2021. Those who say they don't intend retrofitting their homes at their own expense declines from 53% to 11% when the availability of government assistance is a factor. The positive effect of government assistance on intention to retrofit has changed little since 2021.

Lack of awareness is curtailing the effectiveness Government retrofitting or energy efficiency grants

Just 1 in 10 (9%) have availed of Government retrofit or energy efficiency grants. Twice that number (18%) have made enquiries. However 1 in 4 (25%) are unaware of such grants including 30% of homeowners.

I am unaware of any grants that might be available



The areas we are most willing to change our behaviour

We find it easiest to commit to reducing our clothing purchases (71%), buying more locally produced food and drink (67%) or buying less food and drink (65%). Half of us (51%) would find it easy to commit to reducing our meat intake. Just over half of us find it easier to commit to reduced air travel (54%), using public transport or walking more (52%).

It's harder to change our behaviour towards home heating or using electronic devices

While 41% of us would find it easy to commit to reducing our use of fossil fuels to heat our homes, more of us, 50%, would find it harder. Committing to using our electronic devices less often would be easy for 45% but harder for more of us, 47%.

More of us find it harder to commit to these changes than was the case two years ago

While there has been an increase since 2021 in the number of people who would find it easier to commit to these changes, the number of people who would find it harder has seen a greater increase, particularly for reducing time on devices and reducing fossil fuels for home heating.

Younger adults struggle more to commit to these changes, except for walking or using public transport more

On average, just over half of us (52%) would find it easy to commit to walking or using public transport more, slightly higher (54%) among those aged 18-24. When it comes to changing our habits in relation to clothing or food and drink, younger adults find it harder to commit and older adults find it easier.



1 in 2

would find it harder to reduce fossil fuels usage

Changes seen as easy to commit to

Age group	Reduce clothing purchases	Buy more locally produced food and drink	Reduce food purchases	Reduce meat intake
18-24	53%	54%	49%	34%
25-34	65%	65%	64%	50%
35-44	70%	64%	60%	48%
45-54	69%	64%	65%	54%
55+	80%	75%	76%	57%
Average	71%	67%	65%	51%



Most of us feel we could do more to reduce our impact

While two thirds (66%) believe our household is doing all it can, only 1 in 5 (22%) believe we are doing all we can on a personal level to reduce our carbon impact.

Older adults are more convinced that they are doing all they can than younger adults, both at a household and individual level

Those aged 55+ are twice as likely as those aged 18-24 to believe they are doing all they can on a personal level to reduce their carbon impact (32% vs. 13% respectively). Eight out of ten in this age group believe their household is doing all it can, compared to just under 1 in 2 of those aged 18-24.

Age group	I agree my household does all it can to reduce our carbon footprint	I agree I do all I can to reduce my carbon impact
18-24	48%	13%
25-34	55%	15%
35-44	62%	18%
45-54	67%	19%
55+	79%	32%
Average	66%	22%

The use of fossil fuels for transport, heating and power is seen as the main area where households can contribute to combatting climate change

Half of us believe that moving away from fossil fuels as an energy source is the best way households can make an impact for climate change. Census 2022 data shows a quarter of Irish households already use renewable energy sources such as solar panels and heat pumps for heating and power (1). This is good news, as research shows that once at least a quarter of the population get behind a new behaviour, the pace of change is likely to significantly increase (2).

Behaviour that is more individual in nature, like the clothes we buy or the food we eat, is seen as less impactful at a household level. Where 1 in 2 believe that households can make a difference by moving away from fossil fuels, just 1 in 3 believe that fast fashion, food miles or food waste will make a difference and just 1 in 10 believe household food purchases will make a difference.



Cost of living continues to dominate our concerns

The cost of living remains the key issue on our minds, mentioned by 43% as the number one issue to be addressed in Ireland today. This is well ahead of the second most pressing issue, homelessness, mentioned by 15%. Taken together, homelessness, housing and affordable rents are regarded as most important by just over a third (36%). Access to quality healthcare is a priority for 10%.

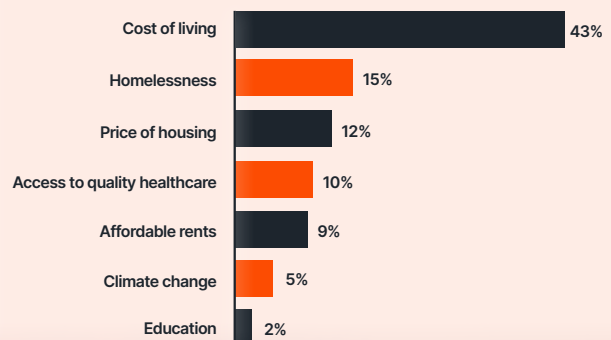
Top 5 most important issues to be addressed	August 2023	October 2021	Change
Cost of living	43%	20%	+23%
Homelessness	15%	13%	+2%
Price of housing	12%	16%	-4%
Access to quality healthcare	10%	15%	-5%
Affordable rents	9%	10%	-1%

When we last looked at climate change and sustainability in 2021, the cost of living, as today, topped the list of issues to address. However it has become the top issue for more than twice as many people today as it was back then. Homelessness, the price of housing and affordable rents taken together were a top priority for over a third, as is the case today. Despite a recent resurgence, Covid has receded as an issue. In 2021 it was the top issue for 15%, today it is the top issue for <2%.

Despite high levels of concern about climate change, when seen in the round it ranks 6th in our list of priorities, dwarfed by concern about the cost of living

What has not changed is where climate change ranks in our list of priorities. Today it ranks 6th overall, seen as the most important issue to address by just 5% of us. In 2021 when Covid was more of a concern it ranked 7th, regarded as a top priority by just 6%.

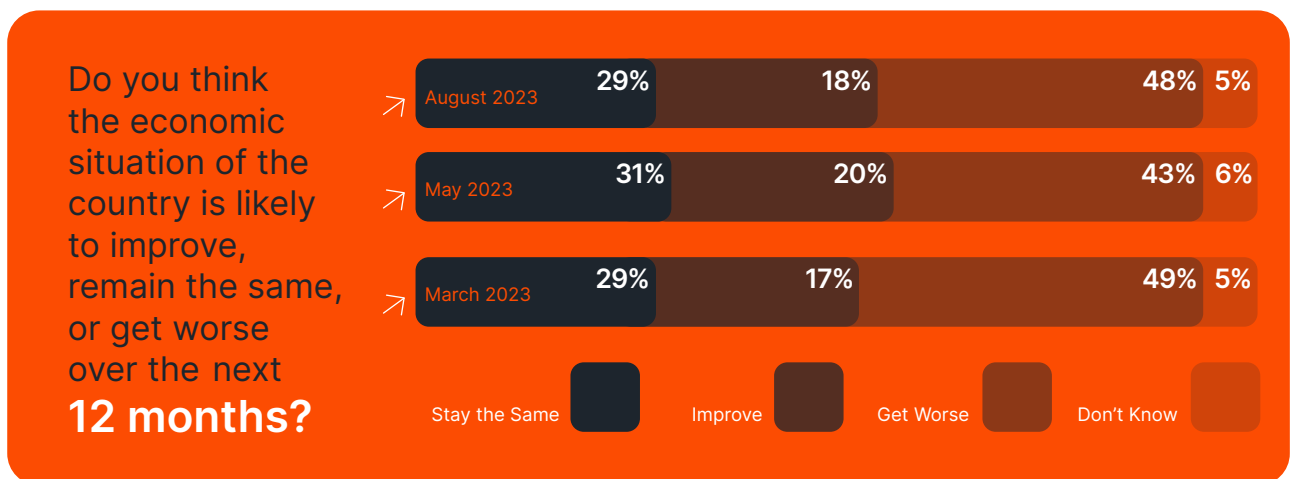
Our Top 7 Concerns



Our view on the Irish economy

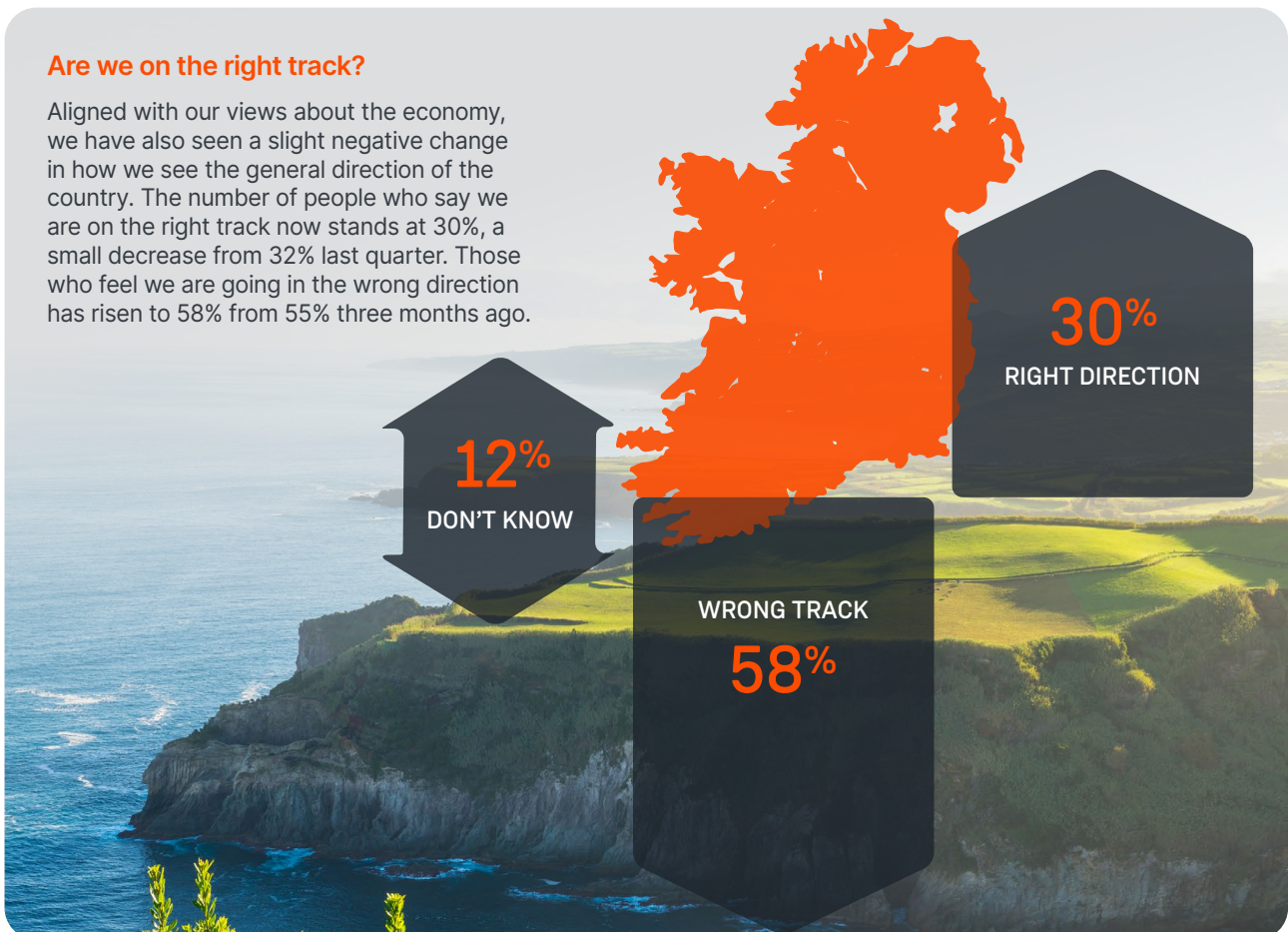
Following previous improvements, concerns about the economy increase

Following three consecutive quarters of improving optimism, our latest research shows a reversal in how we feel about the future of the economy. Nearly half of us (48%) now expect it to get worse over the next 12 months while fewer than a fifth (18%) say it will improve. On its own, the change over a single quarter is notable. However, going back to March, there is almost no change.



Are we on the right track?

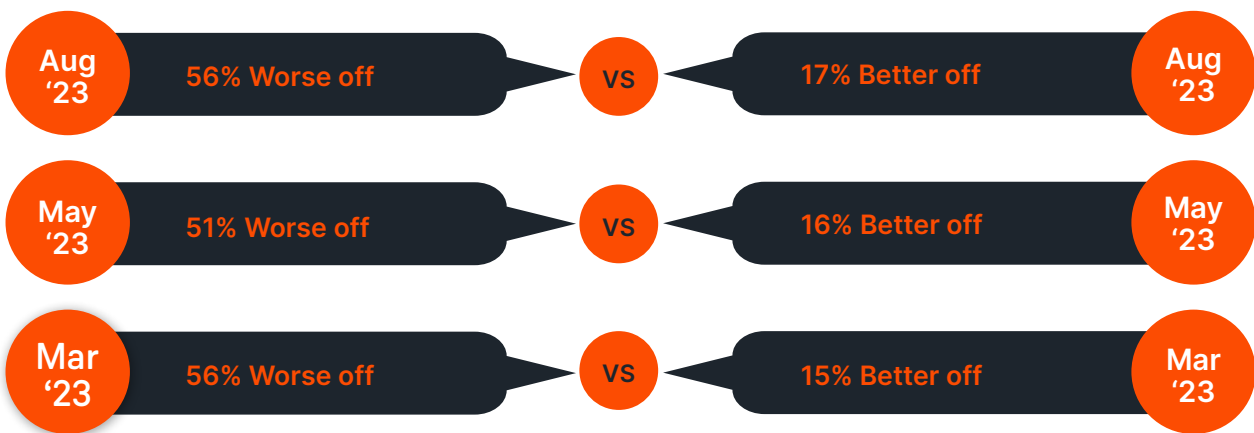
Aligned with our views about the economy, we have also seen a slight negative change in how we see the general direction of the country. The number of people who say we are on the right track now stands at 30%, a small decrease from 32% last quarter. Those who feel we are going in the wrong direction has risen to 58% from 55% three months ago.



How we describe our personal finances

Are we doing better than a year ago?

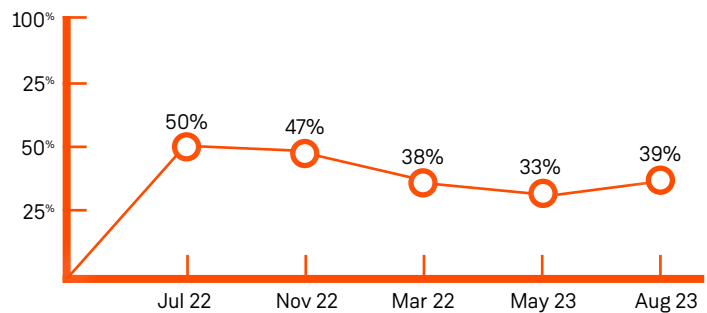
There has been a rise in the number of people who say their situation has become worse when comparing their personal finances to where they were this time last year. Now, 56% of people say it has deteriorated compared to 51% in May. However, the trend remains broadly unchanged when looking to how we viewed our situation in March.



Where do we see ourselves in 12 months?

In keeping with trends elsewhere, there has been a slight reduction in optimism about the future when considering whether we will be better off this time next year. Just under a quarter (23%) expect to be in an improved position, compared to 25% three months ago. Those who say they will be worse off has also changed, rising from 33% to 39%. In total, 33% expect their situation to remain the same.

Expect to be worse off in 12 months

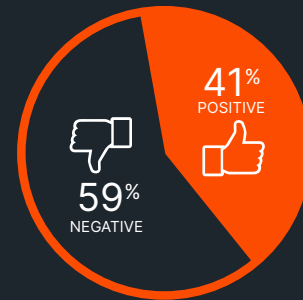


What do we feel about living in Ireland today?

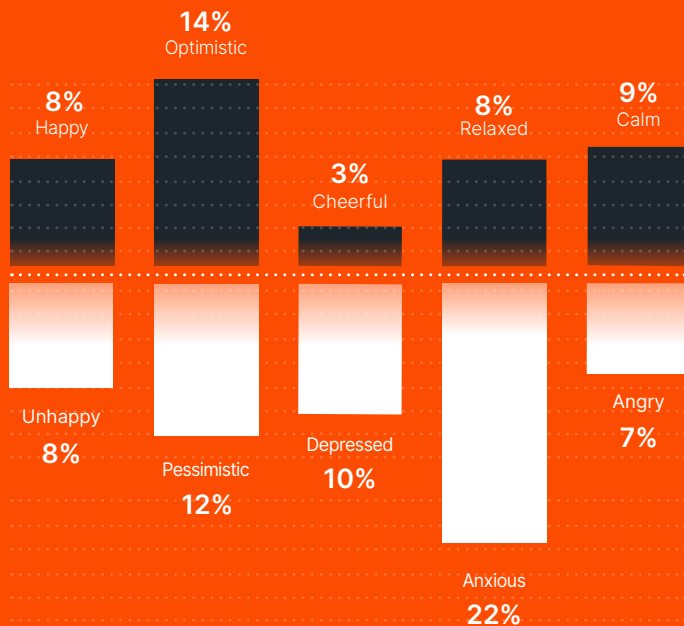
Reflecting rising concern about the economy and our personal finances, our latest research shows a marked rise in the number of people who report a primarily negative emotion about living in Ireland. While we reached close to parity in our previous report, the margin between positive and negative feelings is now quite significant.

Anxiety ranks particularly high, with nearly a quarter of us (23%) reporting this as our dominant feeling. The highest of positive feeling is optimism, with 14% of us feeling this way.

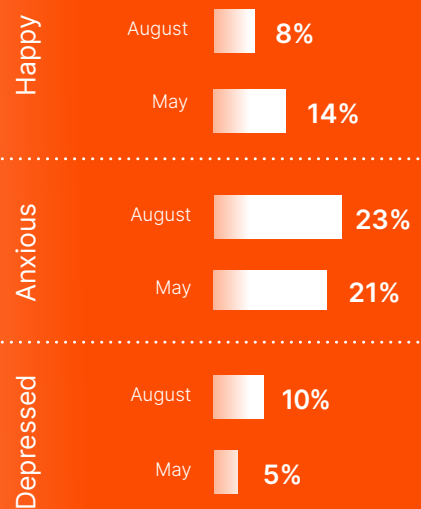
How do we feel?



Nation's Emotions



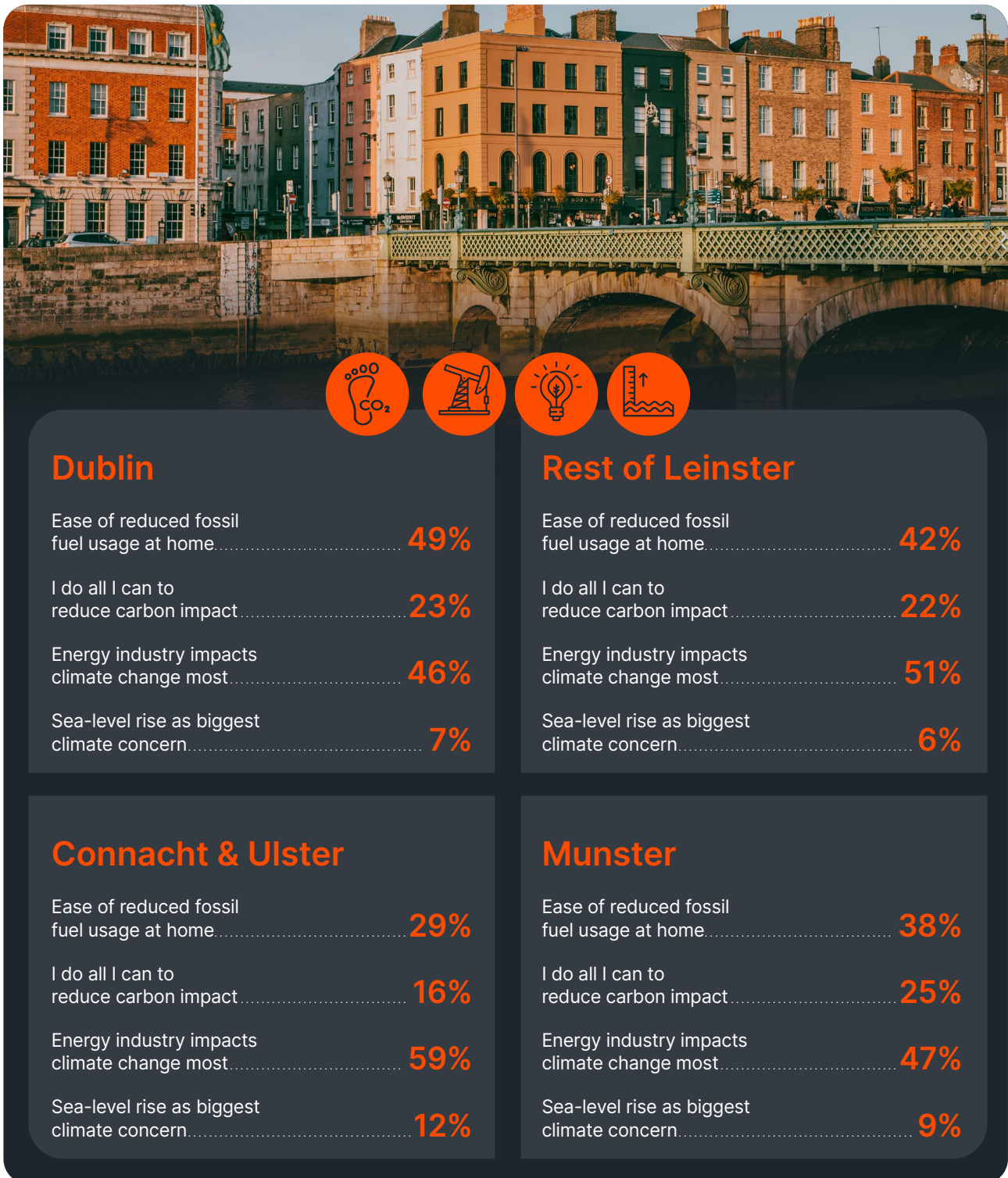
Three-month change



Reflecting the Nation

A regional view of our personal views on climate change

Half of people in Dublin would consider reducing their fossil fuel usage for heat at home while fewer than a third of those in Connacht and Ulster say the same. Those in the northwest are also nearly twice as likely as people in Dublin to be most worried about sea-level rises. People in Munster are most likely to say they are doing all they can to reduce their carbon impact.



Methodology

In the tenth edition of Reflecting Ireland, we take a look at the nation's views on climate change and sustainability.

References

1. <https://www.irishtimes.com/ireland/2023/07/27/indications-of-transition-to-renewable-energy-in-irish-households-in-census-2022-data/>
2. <https://www.bi.team/blogs/how-can-we-build-a-net-zero-society/>

- An online survey was conducted of 1,000 people in the Republic of Ireland
- Sample was nationally representative of the population based on gender, age, social class and region
- Fieldwork was carried out between August 9th and 22nd, 2023
- Data weighted to reflect the adult population aged 18+
- The margin of error for this research is +/- 3%

For further information, contact;

Leontia Fannin
Head of Corporate Affairs & Communications
PTSB
leontia.fannin@ptsb.ie

Emma Kavanagh
Research Director
Core Research
Emma.Kavanagh@onecore.ie

Claire Cogan
Director
BehaviourWise
claire@behaviourwise.ie

