



UK consumer attitudes to the environment

Schneider Electric UK & Ireland

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Foreword

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When asked whether we care about the planet and the environment, 'no' would be an almost unthinkable answer. Most would say that they already recycle, conserve energy and support businesses that work to reduce their emissions and use of plastic.

The reality is that 1st August 2018 marks the earliest Earth Overshoot Day (EOD) ever recorded - the date when we (all of humanity) have used more from nature than our planet can renew in the entire year.

First calculated in 1969, when it fell on 29 December, this date has been hurtling towards an earlier day each year. In 1988 it fell on 15 October, in 1998 – on 30 September, while in 2008 it was already confirmed for 15 August. If the present trend continues we could reach Earth Overshoot Day in January within the next 50-60 years. The bottom line is that, every year, human activities are becoming less and less sustainable for the planet.

At the same time, rather surprisingly, this year's UK Environmental Accounts showcased that British households were actually the biggest emitters of Green House Gases (GHG) since 2015, over-taking

the energy supply sector, and responsible for one-quarter of all UK GHG emissions in 2016.¹

It is clear, therefore, that the energy efficiency challenge and the role of consumers in advancing the environmental agenda are underestimated. Consumers have an important role to play when it comes to saving the planet, and our individual choices do make a big difference.

We have commissioned this UK-wide consumer survey to explore consumer habits and behaviours when it comes to energy saving, energy efficiency and recycling, and examine whether consumers could be doing more today to help safeguard the planet for future generations.

The outcomes of the study clearly show that more needs to be done to encourage consumers, government and businesses to work together if we are to make good on the UK's environmental promise.

¹ <https://www.ons.gov.uk/economy/environmentalaccounts/bulletins/ukenvironmentalaccounts/2018>

Methodology

From May to June 2018, Schneider Electric conducted a representative consumer survey research across 2,000 respondents in the UK². The purpose of the research was to uncover and understand the attitudes and behaviours of a range of respondents when it comes to the most important issues facing society.

Executive Summary

Times change, and each new generation faces its own set of challenges. Yet, these issues are rarely solved outright unless they penetrate the public consciousness. It is our perception of these challenges and, crucially, our actions that will help push Earth Overshoot Day further away or bring it even closer.

When time and resources are finite, whatever is not on our list of top priorities tends to be overlooked.

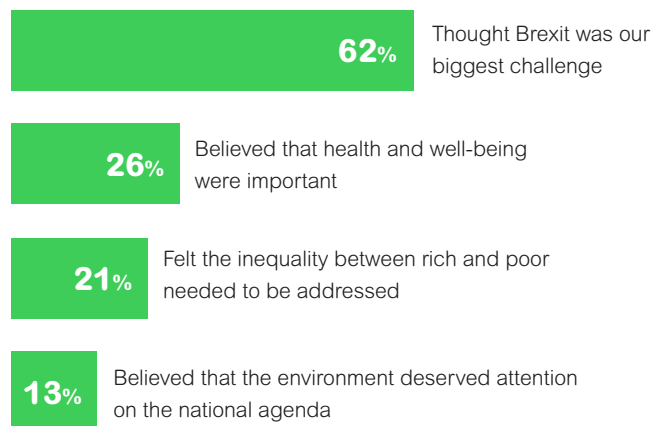
Our research finds that:

- UK consumers are more than twice as concerned about Brexit than the nation's health and wellbeing and more than five times as concerned about Brexit than environmental issues
- August 1st is the earliest Earth Overshoot Day has ever fallen, yet the vast majority of UK consumers don't have any plans to improve the way they live their lives from either a health or environmental perspective
- Generation Z thinks that reducing energy consumption is half as important as those over 55 years of age
- Young adults are four times less likely to believe that cutting plastic waste is an issue than those over 55
- UK consumers leave 77 million lights, electronic devices or appliances on or on standby in the UK each day
- Only 9 per cent of UK consumers blame themselves for leaving lights, devices and appliances switched on in their home, 46 per cent blame their families

Almost two thirds (62 per cent) of the population thought Brexit was our biggest challenge while only 26 per cent believed that health and well-being were important, meanwhile 21 per cent felt the inequality between rich and poor needed to be addressed and only 13 per cent believed that the environment deserved attention on the

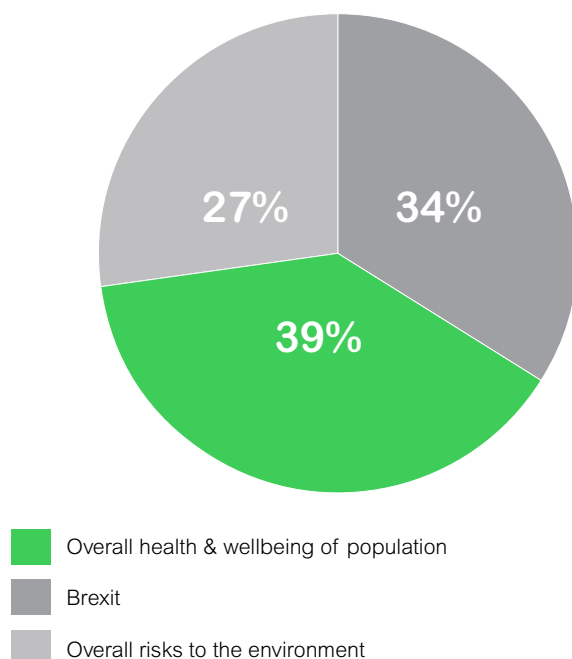
Biggest UK challenges

Question: What do you think are the most significant challenges we face/have faced to secure Britain's future economic and societal success?



UK consumers think our country's investment priorities should be

Question: If you were a member of the government with influence, which of the following would you invest in?



² The survey conducted by OnePoll on behalf of Schneider Electric

Facing the facts: Are UK consumers doing enough?

If we are to reverse the negative trend of using more of the earth's natural resources earlier and earlier each year, it is clear that energy efficiency is a much bigger challenge than we realise.

The study revealed that, across the board, 90 per cent of UK consumers have no plans to do more to improve their own well-being and that of the planet.

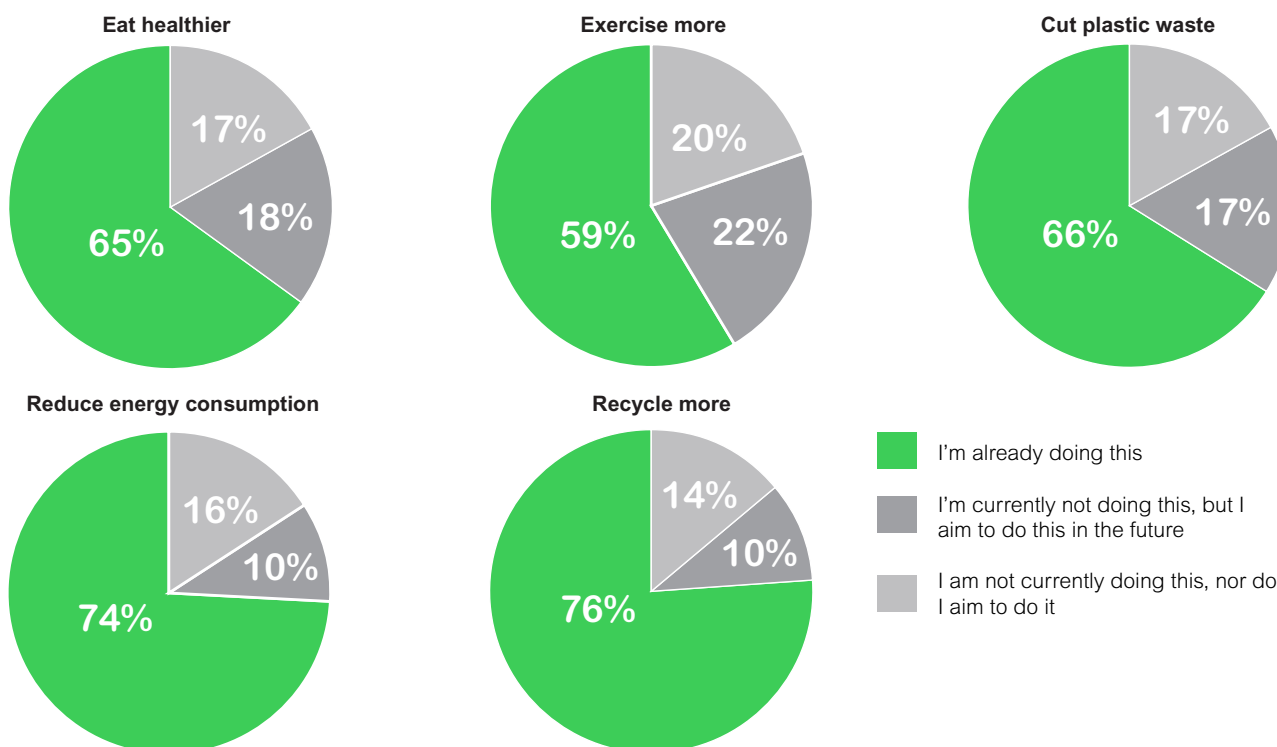
This was most apparent in energy consumption where a frightening 16 per cent of respondents, equivalent to about 10.2 million UK residents, have said they have no intention of curbing their energy consumption

habits whatsoever while 74 per cent believe they are already doing enough. This raises questions as to where exactly we will be able to save energy in the longer term.

According to respondents, 77 million lights, devices and appliances are left on or on standby every day in households across the UK. However, just 6 per cent of the UK population think we need to reduce our energy consumption, while 46 per cent believe their partner or their children are the worst culprits for leaving on lights, or devices plugged in. Only 9 per cent blame themselves.

UK consumers believe they are doing enough already

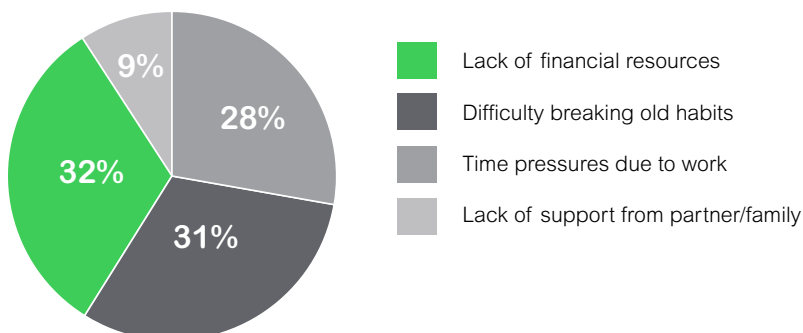
Question: What are you doing to actively try to improve the way you live your life, and when did you start doing it?



Schneider Electric calculates that the world will consume 1.5 times more energy within the next 40 years thanks to the increasing electrification of all aspects of our lives. We will need to halve CO2 emissions in order to avoid irreversible damage to our planet.

UK consumers cite pressure at work and lack of motivation for failures to do better

Question: What has ever stopped you, or stalled you, from implementing changes to try and improve the way you live your life?



Money comes first: short-term financial gains trump all

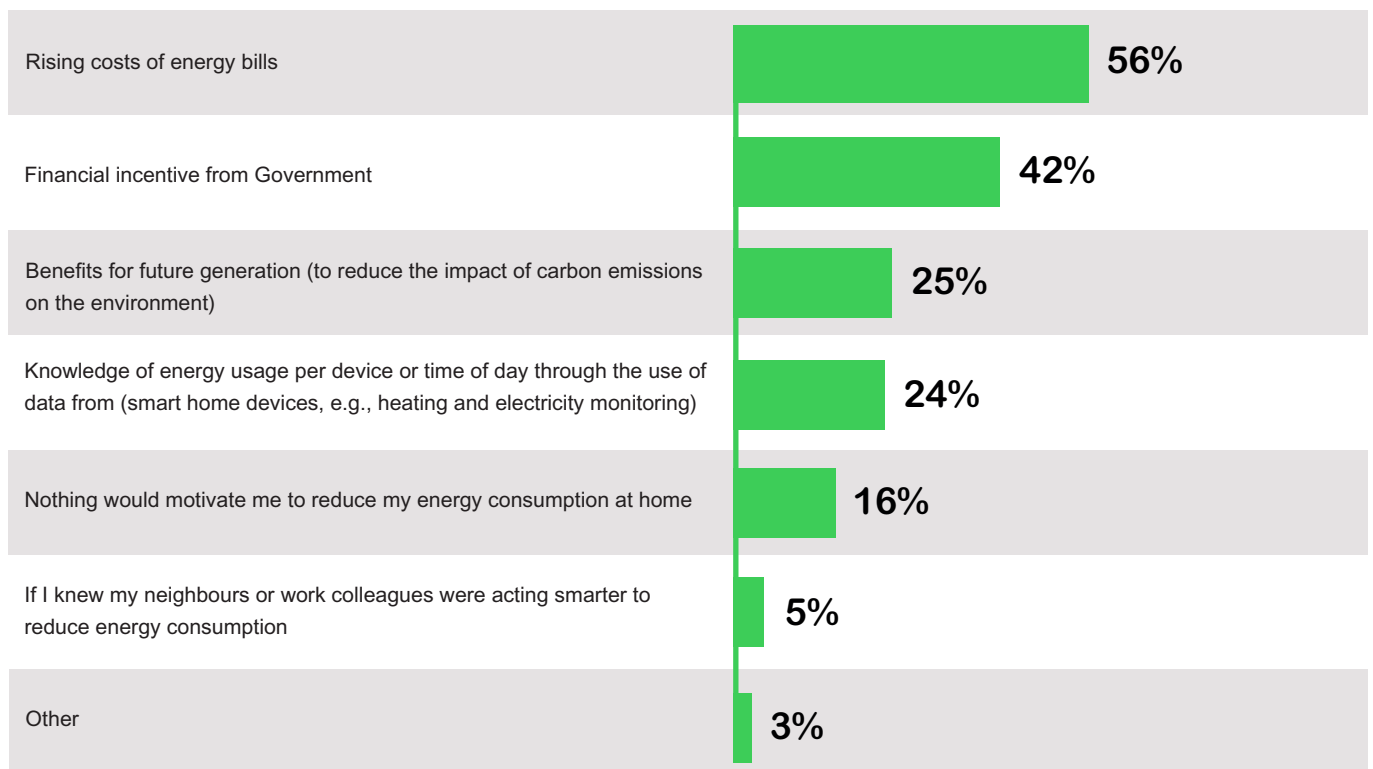
When asked what would motivate them to reduce their energy consumption at home, 42 per cent of respondents cited financial incentives from government and 56 per cent cited the rising cost of energy bills. The survey indicates that short-term concerns are more important than longer-term issues. Only 25 per cent of UK consumers said that the

benefit for future generations would motivate them to reduce the impact of carbon emissions on the environment.

Another 24 per cent said that having data on their consumption (from smart meters, for example) would provide them with the necessary motivation.

Short-term financial gains trump longer-term benefits when it comes to energy efficiency

Question: What do you think would motivate you to reduce your energy consumption at home?



Consumers believe that it's up to the government to tackle all issues – from Brexit to climate change

When asked whose responsibility it is to tackle the most significant barriers to Britain's future economic and societal success, 74 per cent of respondents said it was the government's job to ensure Britain's prosperity and green future.

An uncertain future: Generation Z cares less for the environment

Generation Z respondents were half as likely to think that reducing energy consumption is an issue and four times less likely to believe that cutting plastic waste is a concern compared to those over the age of 55. Gen Z also admits to leaving on average 3.38 lights, chargers, electronic devices or appliances either on or on standby each day in their homes versus 2.1 for over 55s.

Over a quarter of the Gen Z respondents (28 per cent) said they had no desire to reduce their plastic waste, energy consumption (27 per cent) or start recycling any time soon (25 per cent). However, 29 per cent intend to cut plastic waste, 20 per cent promise to recycle more and 17 per cent are committed to reducing their energy consumption by switching off unused lights and devices as they were not doing this already.

As the digital native generation, Generation Z – are already big consumers of energy – more likely to livestream videos than to watch traditional TV or read a book, shop online and use connected devices³. This generation will be the biggest energy users of tomorrow.

Generation Z was the most likely group to identify time constraints (41 per cent) as a reason for their failure to address these challenges, as well as to cite the difficulty of maintaining motivation (38 per cent) and lack of financial resources (37 per cent). The youngest

respondents were also the least likely to take action to reduce their energy consumption, including turning off appliances when not in use – which only 51 per cent say they do instinctively – turn off lights when leaving the room (56 per cent), and reducing the loads on their household appliances (24 per cent).

Winning over Generation Z could be the tipping point that decides whether the UK will become a nation driven by efficiency or whether it will drown in a waste-filled future. They are more apathetic while, at the same time, more likely to promise to change their future behaviour than any other age group. Gen Z is the most critical section of the population for the UK to achieve its future climate goals.

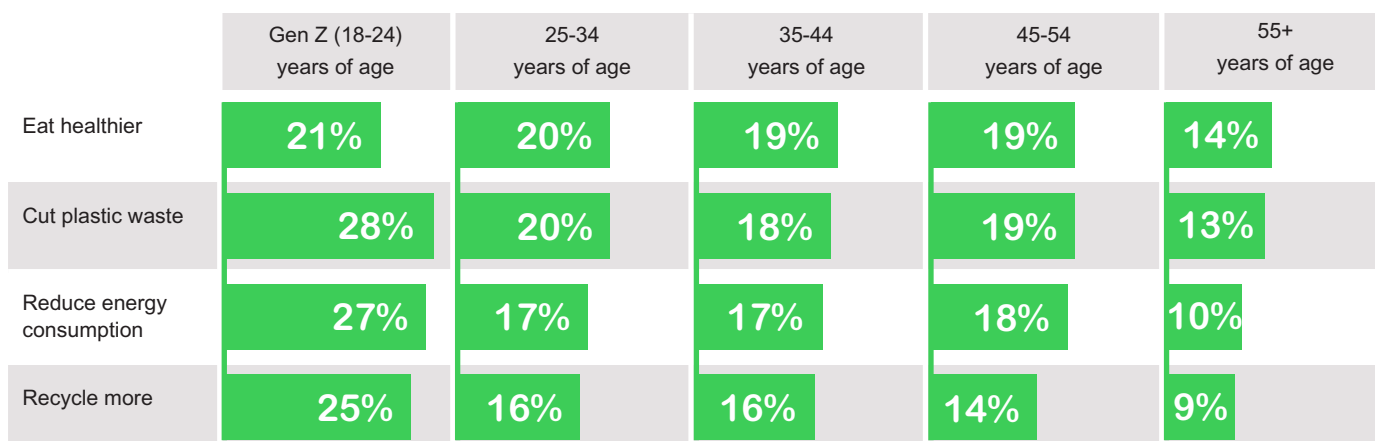
Generation Z is less likely to believe that government should tackle these challenges

While two thirds (67 per cent) of those aged 18 – 24 agree that this is government is responsible, this rises to 77 per cent among 45 – 54 year olds, and 81 per cent of over 55s.

Generation Z is the age group the least concerned about the planet

Question: What are you doing to actively try to improve the way you live your life, and when did you start doing it?

I am not currently doing this, nor do I aim to do it



³ Ofcom report: https://www.ofcom.org.uk/_data/assets/pdf_file/0017/105074/cmr-2017-uk.pdf

Looking out for Mother Earth – how men and women differ

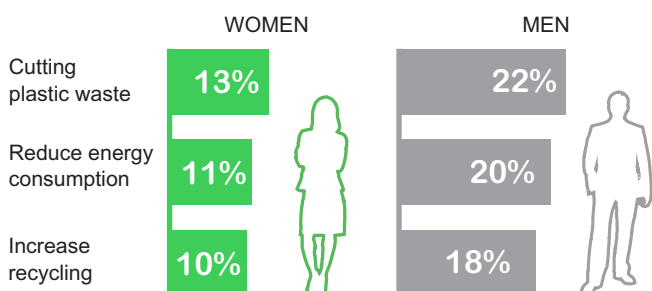
There is little difference between men and women when it comes to showing their concern for the environment, or their desire to do the right thing.

Yet, women are considerably more likely to take action. Fewer women (13 per cent) than men (22 per cent) said they are not already reducing plastic waste and have no intention to start doing so in the future. Fewer women than men said they have no plans to reduce their energy consumption (11 per cent versus 20 per cent of men) and have no plans to recycle (10 per cent versus 18 per cent).

Women are also more likely than men to ‘instinctively’ turn off appliances, unplug chargers, switch off lights, and reduce the loads on appliances.

Women are also significantly more likely than men to say that having data on energy consumption would further motivate them to reduce consumption (27 per cent against 20 per cent).

Not doing it and have no intention to start



The Welsh are the most environmentally sustainable and energy conscious citizens – Regional breakdown

Almost nine out of ten (89 per cent) of Welsh consumers say they are already reducing energy by turning off lights, devices and appliances when not in use with just 7 per cent of Welsh respondents saying they have no plans to try and save energy. Londoners are the least energy conscious with 31 per cent admitting that they don't currently try to conserve energy by turning things off when they aren't using them.

Londoners were also the least likely to recycle with three in ten (31 per cent) saying they don't currently recycle or don't plan to start in the future. North Easterners are the best at recycling with 85 per cent saying they recycle all they can, narrowly beating Wales where 83 per cent are already recycling.

When it comes to the most significant challenges to our future success as a country, cutting plastic waste is the biggest concern in most regions. Reducing pollution is of greatest concern in Wales (15 per cent). However reducing energy consumption is low on the agenda across the board. In Northern Ireland just 2 per cent of respondents thought this was a significant challenge.

Question: What do you think are the most significant challenges we face?

	East Anglia	East Midlands	London	North East	North West	Northern Ireland	Scotland	South East	South West	Wales	West Midlands	Yorkshire and the Humber
Brexit	64%	62%	63%	65%	60%	65%	64%	57%	71%	59%	52%	61%
Health and wellbeing	27%	27%	26%	25%	28%	29%	27%	24%	22%	28%	30%	26%
Overall risks to environment	16%	8%	15%	13%	8%	8%	18%	15%	18%	12%	14%	9%
Cut plastic waste	13%	12%	7%	17%	14%	11%	10%	9%	11%	10%	11%	7%
Reduce energy consumption	4%	7%	5%	10%	8%	2%	6%	7%	5%	4%	8%	6%
Reduce pollution	9%	14%	8%	8%	5%	3%	9%	12%	10%	15%	10%	8%
Increase recycling	4%	6%	5%	7%	5%	5%	3%	5%	7%	3%	8%	7%

Occupation matters

When it comes to different professions, the disparity of views on key issues can be staggering. While most have similar views on the issue of plastic waste, those working for energy companies and utilities are 10 times less likely to think of overall environmental risks as one of the major issues for the UK compared with artists, designers or public servants. However, those working in the energy and utilities sector think reducing energy consumption is a much greater concern than other professions.

Those in the education sector are 5 times less likely to see the need for increased recycling as a big issue versus those in the energy and utilities sector.

Household Income stats

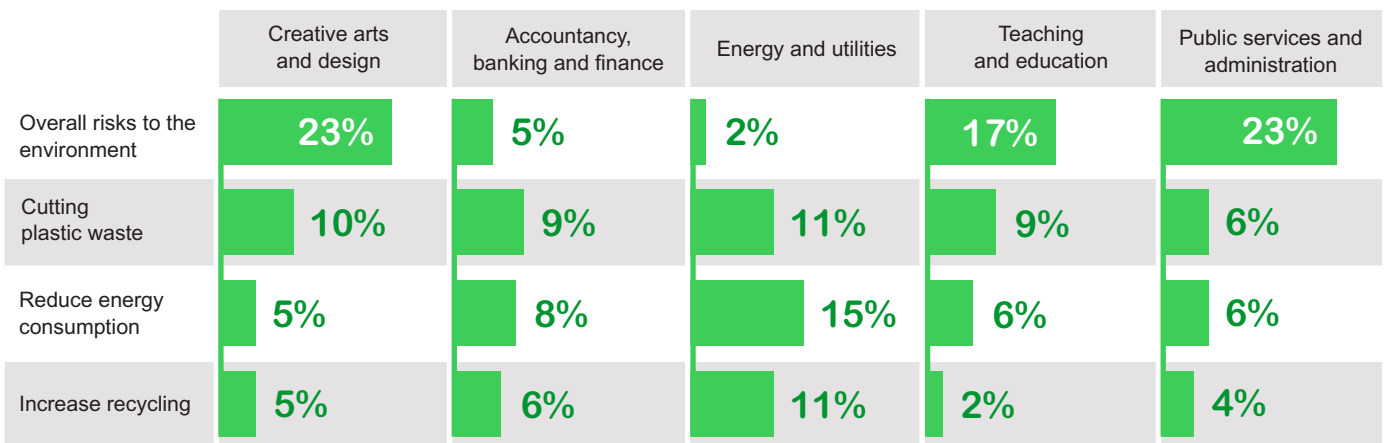
Our findings show that issues related to environmental risks or energy consumption were of much less concern to both the richest and poorest in society.

Of those with annual household income of £20,000-25,000 or just under the UK average of £27,000⁴, 26 per cent of respondents cited the challenge of cutting plastic waste as their main concern, vs. 29 per cent of those earning £35,000-40,000, 31 per cent on £50,000-60,000. Only 27 per cent of those earning over £70,000 cited plastic waste as a concern.

We see a similar trend when it comes to the challenge of reducing energy consumption and increase in recycling.

Those in banking and finance, on average, seem to be less concerned about the UK's environmental challenges compared to other professional occupations

Question: What do you think are the most significant challenges we face/have faced to secure Britain's future economic and societal success?

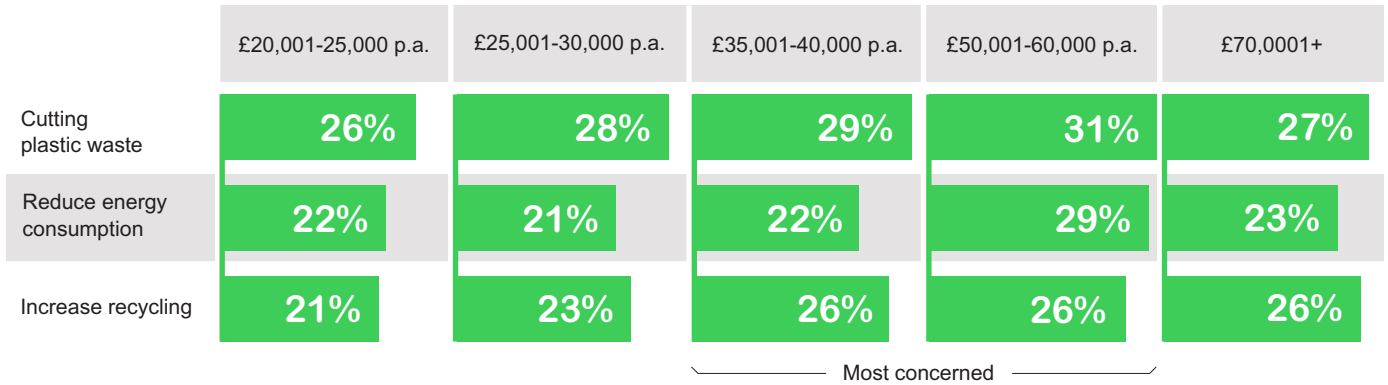


Yet, more of those earning between £50,000 and 60,000 said they do not try to reduce their plastic waste or plan to do so in the future (22 per cent), do not try to reduce their energy consumption (19 per cent) nor already recycle (13 per cent) or plan to do so in the future – compared to those on the lower-than average household incomes or those earning over £70,000 a year per household more of whom are already recycling, reducing their plastic waste and saving energy.

⁴ Based on the Office for National Statistics' (ONS's) Living Costs and Food Survey, the UK median disposable household income was £27,300 in the financial year ending (FYE) 2017

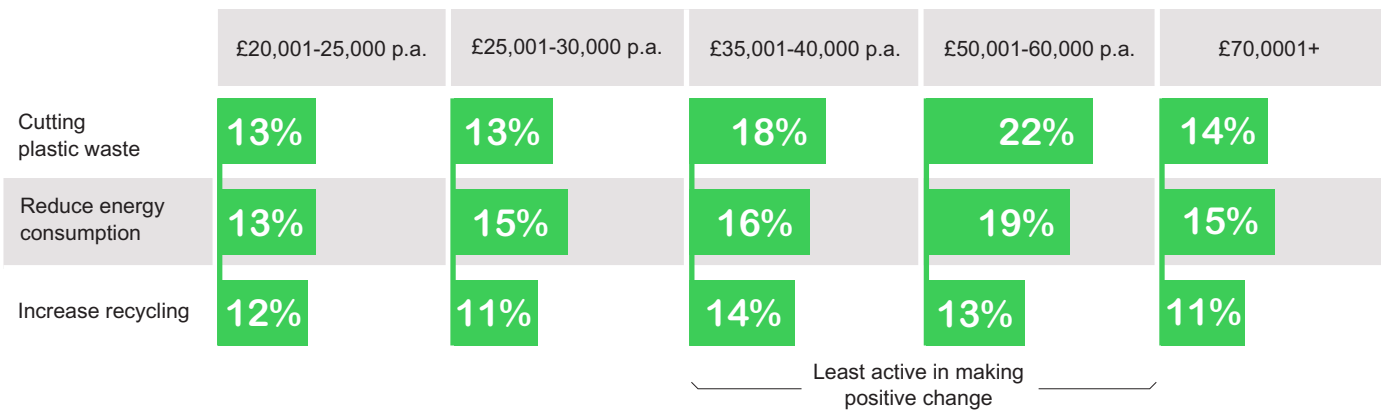
Those on lower incomes and those on over £70,000 tend to be less concerned about environmental challenges

Question: What do you think are the most significant challenges we face/have faced to secure Britain's future economic and societal success?



Question: What are you doing to actively try to improve the way you live?

Currently not doing this, nor am I planning to do this in the future



Don't go it alone: action from both individuals and businesses is needed for Britain to win out

While our survey revealed that more can and still needs to be done by UK consumers to tackle the country's environmental challenges, we must not forget that businesses have an important role to play in encouraging employees to do the right thing.

Worryingly, over half (66 per cent) of respondents said their employers have no energy consumption policies in place or they were not sure what they were, while a majority of respondents (56 per cent) said their employer did not support a single initiative for encouraging positive changes in the workplace such as reducing plastic waste or living more healthily over the last 12 months.

Around 28 per cent of UK consumers cited time pressures due to work as preventing them from implementing changes to try and improve the way they live their lives and contribute to the health of the planet.

Conclusion

This report clearly shows that energy efficiency is a much bigger challenge than we realise.

Not only do 90 per cent of UK consumers admit to having no plans to do more to improve their own well-being and that of the planet. They also leave 77 million lights, devices or appliances on, or on standby, in the UK every day.

The survey also indicates that short-term concerns are dwarfing longer-term issues. Only a quarter of UK consumers say that the benefits for future generations would motivate them to reduce the impact of carbon emissions on the environment.

Earth Overshoot Day – the earliest it's ever been – should be a wake-up call. We all need to look at how we can start to reverse this trend of using the earth's resources faster and faster. This includes how we produce goods in manufacturing plants, how we occupy buildings, store our data and even turn on the lights at home. It is worrying that UK consumers believe that they are already doing enough when it comes to their lifestyle choices. Collectively, we must become three times more efficient if we are to reverse the trend and start to move Earth Overshoot Day in the right direction.

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