Consumer Scotland:

Net Zero 2024

May 2024

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Contents

Key findings

- Overall, reported concern about climate change is high among those in Scotland, with three in four (76%) saying that they are either 'very' or 'fairly' concerned about this. Around one in four (23%) are not concerned. While concern is high across all key demographic groups, the proportion very/fairly concerned is particularly high among those aged under 35 (84%) and in higher social grades (ABC1: 81%).
- While concern about climate issues is high, people's self-reported knowledge about what they need to do to take action is much lower. Only 28% say they know a lot/completely about what they need to do to help Scotland reach Net Zero by 2045, while 31% say they know nothing/not much and 42% are in the middle.
- When it comes to general purchasing behaviours, while around half (52%) say that they are likely to change their purchasing habits in the next year as a result of environmental concerns, only one in ten (10%) say they are 'very likely' to do so. Even among those who say they are very/fairly concerned about climate change, this figure is only 13%, indicating that consumers do not perceive there to be a strong necessity to change their purchasing habits in the short term.
- Similar findings are revealed in terms of the extent to which current purchasing choices are influenced by sustainability concerns. Across five product categories, while around half report always/sometimes considering sustainability when buying (e.g. food: 51%, clothing: 48%), this drops to only one in ten saying they 'always' do so.
- Those who have purchased a product online in the last year generally do not take environmental concerns into account when doing so. Only 19% report that they always/sometimes choose retailers that use sustainable packaging, while similar proportions say this about choosing a later delivery date to ensure the item is delivered in a more environmentally friendly way (19%) or opting for environmentally friendly transport options (17%). This indicates that other considerations, such as cost or convenience, tend to take precedence.
- Around two in three (65%) of those living in Scotland would like to reduce the carbon emissions from the transport methods they use. The most common sustainable transport behaviours are using public transport rather than a car (69%), followed by doing active travel (66%) and reducing car mileage (51%); however, the proportion who say that environmental concerns are the primary reasons they do these are much smaller.
- The most commonly cited barriers to choosing transport methods with lower environmental impact are lack of availability of more sustainable options (73%), cost (70%) and the time taken to use them (53%).
- Three in five (61%) adults in Scotland would like to reduce the carbon emissions from the food and drink they buy. The proportions making more sustainable choices in the food and drink they buy are generally higher than for transport, with 87% saying they avoid food waste, 72% choosing locally

manufactured food and 68% avoiding pre-made food. Still the proportions adopting these behaviours for environmental reasons are again much lower than the proportions doing so overall.

- The most commonly mentioned barriers to making more sustainable food and drink choices are a lack of clear labelling on the environmental impact of food/drink (68%), lack of sufficient choice of food/drink with lower environmental impact (64%) and cost (64%).
- Tourism sees low levels of environmental consideration in terms of people's purchasing decisions. Only one in six (17%) of those who have been on a holiday before in the UK or abroad say that environmental concerns play a major or moderate role in their decisions about whether to go on holiday, while a similar proportion say this about how many holidays they go on in a year (18%).
- While high proportions of those who have been on holiday report that a number of travel behaviours apply to them, such as holidaying the UK (70%), Scotland (66%) or Europe (61%) rather than further afield, as well as avoiding short-haul (49%) and long-haul (45%) flights, the decision to do this is generally not driven by environmental concerns.
- The main barrier to people taking action to make their tourism more environmentally friendly is that people have other considerations such as value for money which they value higher than environmental concerns. Among those who took the actions listed, but not for environmental reasons, 36% of people who holidayed in Scotland rather than abroad, 35% who holidayed in the UK rather than abroad, and 34% who report holidaying in Europe rather than further afield cite value for money as a reason. A feeling that holidays are to be enjoyed, and therefore environmental concerns are not something they want to think about, is also high on the list; 28% of those who have avoided taking a long-haul flight mention this as a reason.

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Introduction

Background and understanding

The Scottish and UK government's targets to achieve Net Zero emissions (by 2045 in Scotland and 2050 in the rest of the UK) will require engagement from people in Scotland to change their consumption behaviours across all sectors of the Scottish economy. In practice, for consumers this will require changing the way we purchase, use and dispose of products, as well as changes to the ways we travel and the food we eat.

Enabling and encouraging such a broad range of consumer commitments requires a strong understanding of the incentives and barriers to people doing so, as well as their knowledge of and support for the actions needed to move towards climate mitigation, adaptation and the Net Zero agenda.

In this context, in late 2022/early 2023 Consumer Scotland commissioned an online pilot survey with n=622 adults (aged 16+) resident in Scotland. The research sought to understand how consumers are responding to decarbonisation, focusing on their purchasing behaviours across a range of general consumer markets. Results showed that while overall concern about climate change was high, many of the sustainable purchasing behaviours and choices being presented to consumers can appear as optional or are perceived as only having a limited impact on the environment or tackling climate change. Many did not know what they need to be doing to help Scotland achieve Net Zero, while there was also a sense that governments, businesses and regulators are most responsible for taking action on climate issues, with individual consumer choices being perceived as less important.[1]

The present survey represents an expansion on this previous piece of research, with a larger sample size and more in-depth analysis of consumer behaviours in a wider range of markets among people in Scotland. Topics covered include people's general perceptions of climate change and Net Zero, consideration of the environment in their general purchasing decisions, as well as in-depth analysis on their attitudes towards sustainability in a number of consumer markets, including clothing, transport, food and drink, online purchasing and tourism.

Objectives

This research project aimed to build upon the previous research discussed above in order to:

1. Understand the attitudes and behaviours of people in Scotland in relation to a range of general consumer markets, including household goods, clothing, transport, food and drink, online purchasing and tourism.
2. Improve understanding of consumer engagement with the transition to Net Zero and associated approaches to climate change mitigation and adaptation.

[1] The full survey report can be found here: https://consumer.scot/media/vzig1umd/consumers-and-the-transition-to-net-zero.pdf

3. Identify where consumers currently are in the transition to Net Zero, their hopes for the future, the opportunities available to encourage more sustainable consumption, and the barriers consumers might face in making low and zero carbon choices.
4. Obtain high quality, robust survey findings that are representative of people in Scotland that can be used to inform policy and practice in Scotland and be a baseline for assessing consumer engagement with decarbonisation on the rapidly developing transition to Net Zero.

Sampling

The sample for this survey was n=2,062 and is representative of all adults living in Scotland aged 16+. Fieldwork was undertaken between 26th February and 5th March 2024.

The sampling approach used for this survey is quota sampling, with quotas taken from the 2021 Census. Quota sampling is a non-probability sampling method that involves dividing the population into sub-groups. The relative proportion of each sub-group as a percentage of the total sample is based on known characteristics of the overall population. Responses are collected until the ‘quota’ for each sub-group is reached. Quotas were set for age, gender, social grade[2], urban/rural status, Scottish region, disability status and Scottish Index of Multiple Deprivation. A boost was also included in order to ensure a sufficient number of responses from people living rurally were collected for analysis, which was later weighted down to its natural population incidence.

Interpretation of the research findings

Results are reported throughout at topline level, as well as among key demographic groups. Differences between demographic groups are only reported when they are statistically significant, based on p-values of <0.05.

In some places figures may not add to 100% or match the charts due to rounding.

[2] Social grade is a socio-economic metric classification which groups people based on a number of indicators relating to their social and financial situation. More information is available here.

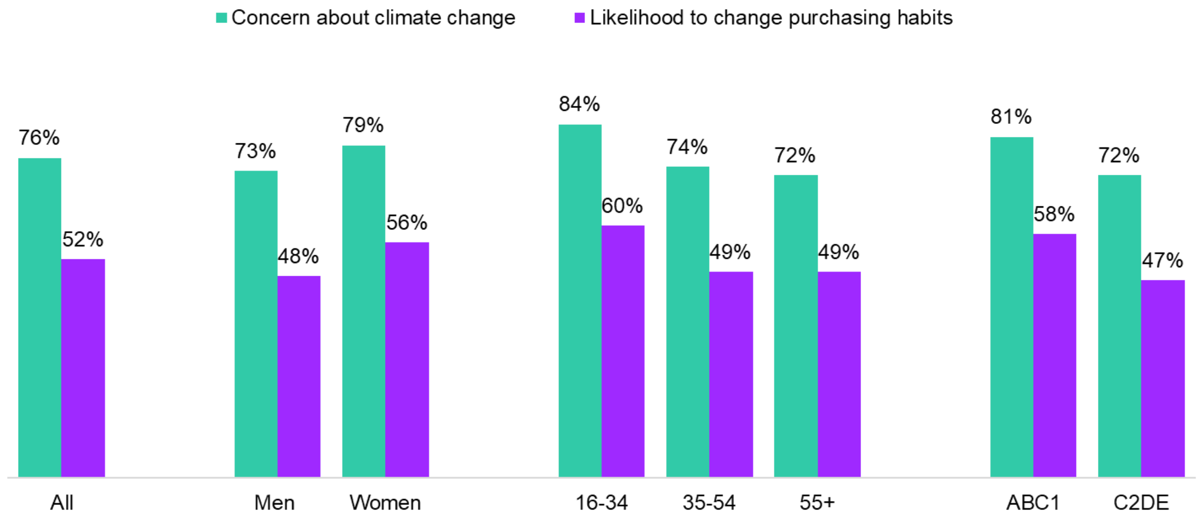
Environmental perceptions

Overall, reported concern about climate change is high among those in Scotland, with three in four (76%) saying that they are either 'very' or 'fairly' concerned about this. Around one in four (23%) are not concerned (either 'not very' or 'not at all') whilst only 1% say they don't know, highlighting that most have an opinion either way.

Whilst concern is high across all groups, it particularly stands out among young people: 85% of those aged 16-24 (and 84% of those aged 16-34). This trend is not unique to Scotland, with numerous studies showing higher climate concern among young people worldwide.[3] There are also differences by affluence, as seen in other studies[4], with those in higher social grades slightly more likely to say they are concerned about climate change (81% of ABC1s vs. 72% of C2DEs). Regionally, concern is higher among those living in the Lothians (83%) than those in the North East of Scotland (70%), which could be a result of the demographic profile of these regions – for example, in the survey Lothians has a higher proportion of young people than almost all (excluding Glasgow) Scottish regions.

It follows that those expressing higher concern about climate change are more likely to have 1) taken sustainable actions previously (as addressed in this report) and 2) say that they are likely to change their purchasing habits in the next year as a result of concerns for the environment (see *Figure 1*).

Figure 1. Concern about climate change and likelihood to change purchasing habits by demographic group



Base: All in Scotland (n=2,062)

[3] BBC news: 'Climate change: Young people very worried – survey' (available here)
[4] Ipsos: 'Public concern about climate change and pollution doubles to a near-record level' (available here)

Whilst concern about climate change is high, fewer people are knowledgeable about what they need to do to help Scotland reach Net Zero by 2045. Around three in ten say that they know what they need to do (28%), whilst a similar proportion saying they do not know what they need to do (31%).[5] Two in five (42%) sit in the middle.

Whilst women are more likely to be concerned about climate change, they are slightly less likely than men to state they are knowledgeable about how they can help Scotland reach Net Zero. A third (33%) of men say that they know what to do, compared to 23% of women. By age, reported knowledge is comparable for younger and older age groups (30% of 16-34s vs. 29% of those aged 55+).

This highlights the lack of knowledge around how people can help Scotland reach Net Zero by 2045, even though reported concern is high. Other data from this research suggests that this concern is not driving people towards taking action to make their consumer behaviours more sustainable, whether in their current purchasing habits or their planned future choices.

[5] Respondents were shown a 5 point scale with ‘1 - I know nothing about what I need to do to help Scotland reach Net Zero by 2045’ at one end and ‘5 - I know completely what I need to do to help Scotland reach Net Zero by 2045’ at the other. Codes 1-2 and 4-5 have been grouped together for analysis.

Environmental responsibility

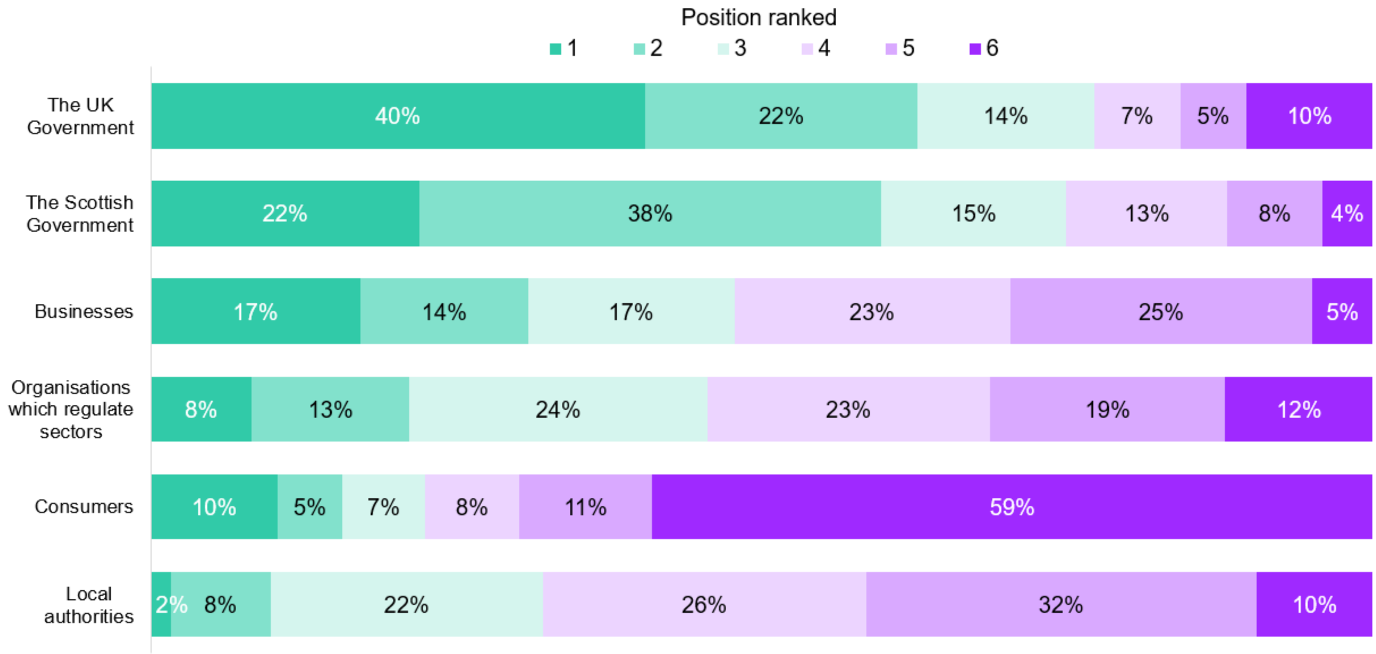
Most in Scotland think that responsibility for reducing carbon emissions should lie with governments or businesses, with far fewer thinking it lies with consumers. This could link to low levels of knowledge about how to help Scotland reach Net Zero by 2045 with many thinking that the responsibility lies elsewhere (and not with them personally).

This became apparent when asking survey respondents to rank who they think should take responsibility for reducing carbon emissions in Scotland (see *Figure 2*). A higher rank (e.g. 1st) indicates a higher level of responsibility, and a lower rank (e.g. 6th) a lower level.

There is a strong view that the UK and Scottish Government should take the most responsibility (ranked 1st or 2nd by 63% and 60% respectively). Most commonly, people in Scotland think that responsibility lies with the UK Government, ranked as the most responsible by 40% (with 22% saying this for the Scottish Government). Following governments is businesses, though a much smaller proportion ranked them 1st or 2nd (31%). For the purpose of this research, all businesses were grouped together. It is also worth noting the research does not tell us why respondents feel that governments and businesses should take the most responsibility, but this could be explored in future research.

Towards the bottom of the list is consumers, with only one in six (16%) ranking them 1st or 2nd. The research highlights that, comparative to the other parties listed, most do not think that consumers should have much responsibility, with seven in ten (70%) ranking them 5th or 6th.

Figure 2. Perceptions of environmental responsibility



Base: All in Scotland (n=2,062)

The leaning towards governments being most responsible for reducing carbon emissions is felt across all demographic groups, with similar perceptions among those who are both concerned, and not concerned, about climate change as an issue.

Although businesses are seen as needing to take less responsibility than governments when it comes to reducing emissions, there is still a general sense that businesses should play a role in doing so. Seven in ten (70%) agree that companies that sell products should be responsible for taking them back for recycling or disposal at the end of product life, even if the consumer is responsible for sending the product back to them. This is felt across all groups, with those who are not concerned about climate change least likely to agree (though still notably high at 47%).

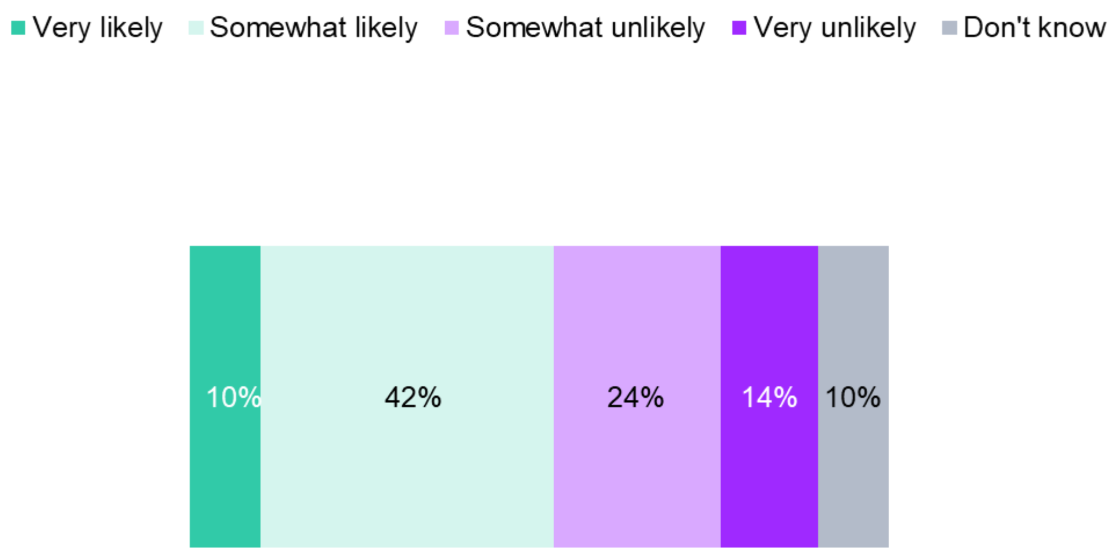
These findings highlight that governments, businesses and regulators are seen to hold much more responsibility for reducing carbon emissions in Scotland than individual consumers. The data implies that for consumers to commit to changing their behaviours in a real and impactful way in the long-term, systemic action at the levels of government and industry are likely to be a prerequisite.

Purchasing habits

When it comes to taking action to be more sustainable in their purchasing behaviours, a slight majority (52%) say that they are very or somewhat likely to change their purchasing habits in the next year as a result of environmental concerns. However, only a small proportion (10%) report that they are 'very likely' to do so, which indicates a low sense of necessity among consumers of the need to change their purchasing habits in the short term. Indeed, even among those who say they are very/fairly concerned about climate change, this figure only rises marginally to 13%. Around two in five (38%) say that they are unlikely to change their purchasing habits as a result of environmental concerns in the next year (including 24% somewhat unlikely and 14% very unlikely). The remainder (10%) say they don't know.

Propensity to change purchasing habits as a result of environmental concerns is much higher among those who are very/fairly concerned about climate change when compared to those who are not very/at all concerned. Two-thirds (66%) of those who are concerned say they are likely to do so, including 13% who are very likely (see *Figure 3*). Only 7% of those unconcerned say they are likely to do so, with less than 1% who are very likely. Similarly, it is also impacted by levels of self-reported knowledge. Among those who say they know (either completely or a lot) about what they need to do to help Scotland reach Net Zero by 2045, 70% say they are likely to make a climate-related change to their purchasing behaviours in the next 12 months, twice as high as those who say they know not much or nothing (34%). Those aged under 35 (60% vs. 49% of those aged 35+), women (56% vs. 48% of men) and ABC1s (58% vs. 47% of C2DEs) also report higher likelihood of changing their purchasing habits in the short-term.

Figure 3. Likelihood to change purchasing habits in next year as a result of environmental concerns



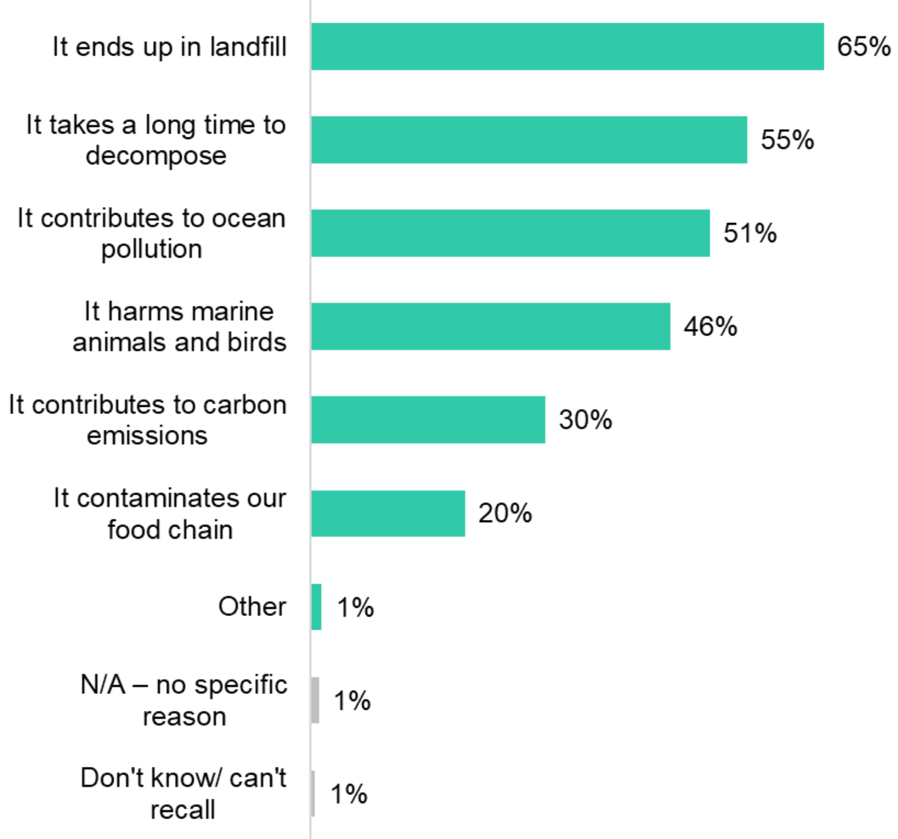
Base: All in Scotland (n=2,062)

In order to further investigate environmental considerations in purchasing decisions, respondents were asked whether their purchasing behaviours had been influenced by a product's materials or packaging in the last year. Just over one third (36%) report having avoided buying products containing non-recyclable/single-use packaging, while a similar proportion (35%) have chosen to buy a product based on whether its packaging was reusable and recyclable. A slightly lower number have chosen whether to buy a product based on the environmental impact of the materials of the product itself (27%). Overall, 54% report doing at least one of these in the last year, while 42% have not and 5% don't know.

The demographic groups most likely to have taken action to make their purchases more sustainable align with those expressing greater concern for climate change in general. Women (58% vs. 49% of men) are more likely to have done at least one of the three actions listed above, as well as under 35s (60% vs. 51% of those aged 35+), and those in ABC1 social grade (58% vs. 50% of C2DEs).

Those who have avoided buying non-recyclable/single-use plastic in the last year were asked their reasons for doing so, with respondents able to choose more than one reason if applicable (see *Figure 4*). The most common reason given is the potential for it to end up in landfill, with two in three (65%) citing this. It taking a long time to decompose (55%) and its contribution to ocean pollution (51%) are also mentioned by around half. Relatively few say it is because single-use plastic contributes to carbon emissions (30%) or because it contaminates the food chain (20%). There are few large differences in terms of reasons cited across demographic groups here, with similar patterns in terms of the most cited reasons seen across groups.

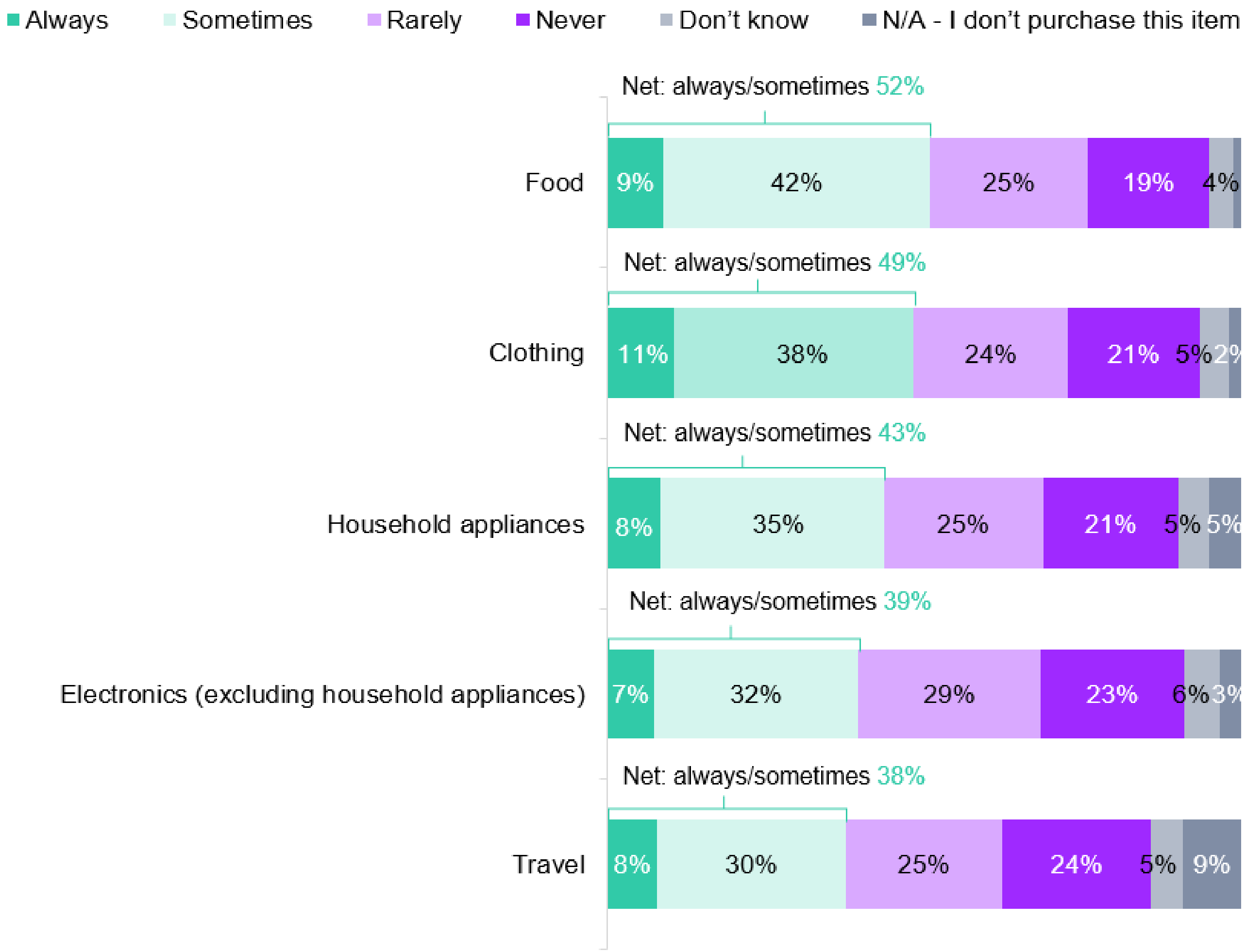
Figure 4. Reasons for avoiding buying products containing non-recyclable/single use plastics



Base: All who have avoided buying products containing non-recyclable/single use plastics in the last year (n=772)

When it comes to general perceptions of their purchasing decisions across a range of product categories, people in Scotland are split as to the extent to which they are influenced by sustainability concerns. As *Figure 5* shows, across all five categories listed, the proportion who report being always/sometimes influenced by sustainability concerns is at a similar level across categories, ranging from 38% for travel to 51% for food. It is important to note that for all of these categories, only around one in ten say that their choices are always influenced by sustainability concerns.

Figure 5. Extent to which sustainability concerns influence purchasing decisions across categories



Base: All in Scotland (n=2,062)

Concern about climate change is, unsurprisingly, a strong predictor of likelihood to say that sustainability concerns always/sometimes influence purchasing decisions across all of these product categories. Among those who are very/fairly concerned, 62% say this about food, 59% about clothing, 52% for household appliances, 48% for electronics and 47% for travel. Those who are not very/not at all concerned are between 30 and 50 percentage points less likely to do so across all product categories; 17% say this about food, 16% about household appliances, 13% for clothing, 13% for electronics and 9% for travel.

Still, those very/somewhat concerned about climate change are only marginally more likely than average to say they *always* consider sustainability in their purchasing choices, hovering at around one in ten for all five product types. Specifically, among those very/somewhat concerned, 12% always consider sustainability when buying clothing, 11% say this about food, 10% for household appliances and travel, and 9% for electronics. Limiting the analysis to those who are 'very concerned' about climate change does result in a slight uptick, though still only 20% of this group always consider sustainability in their clothing choices, 17% for food, household appliances and travel, and 14% electronics. This data reveals that even among those most concerned about climate issues, it is not necessarily translating to their purchasing behaviours to a large extent.

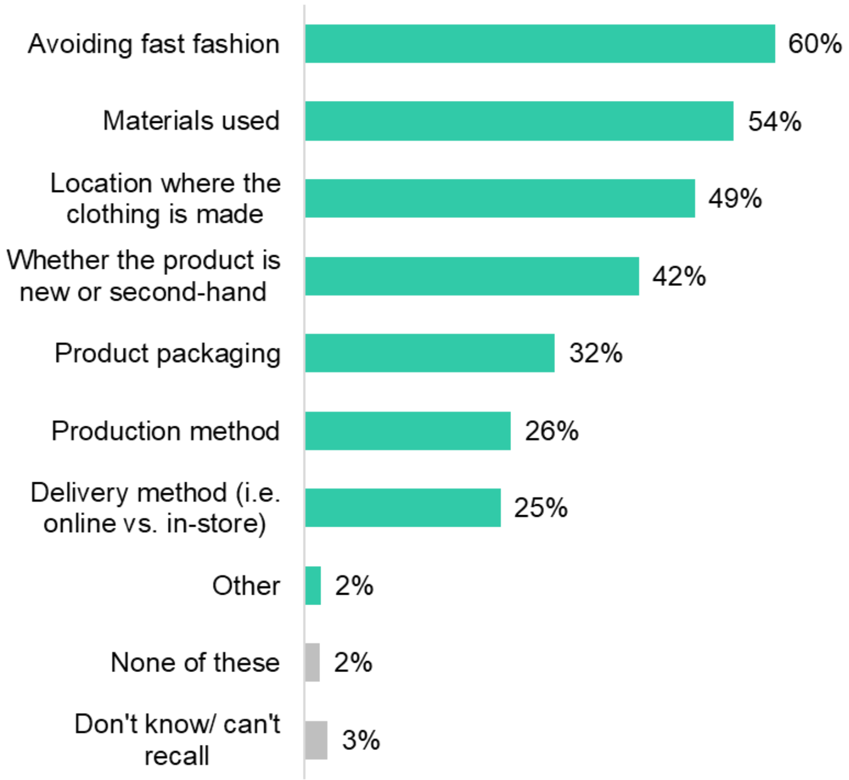
Women are more likely to report that their choices are always/sometimes influenced by sustainability concerns across all five categories. This is partially because women report greater concern for sustainability issues in general; these gender gaps are smaller once the analysis is limited to those very/somewhat concerned about climate change (controlling for level of concern). For example, 56% of women report they always/sometimes consider sustainability when buying food (vs. 46% of men), but when limiting the analysis to those very/somewhat concerned about climate change, we see this gap diminish slightly to 65% of women compared with 58% of men.

Likelihood to consider sustainability concerns is generally lower among older people. For example, 60% of those aged under 35 say they always/sometimes consider sustainability of clothing, compared to 44% of those aged 35-54 and 43% of those aged 55+. This age trend exists for all categories apart from electronics where no strong age trend exists (41% of under 35s vs. 38% of those aged 35-54 and 40% aged 55+), and household appliances, where those aged 55+ (48%) are more likely to consider sustainability than 35-54 year olds (43%) or those aged under 35 (39%). These patterns exist even when controlling for concern about climate change, though the difference for food disappears.

Those in social grade ABC1 are more likely to report considering sustainability in all product categories apart from electronics (43% of those in ABC1 say this about travel, compared to 33% in C2DE, for example). However, controlling for climate change concern eliminates these social gaps.

Those saying that sustainability concerns always/sometimes influence their purchasing decisions for clothing (around half of respondents) were asked which specific factors they consider when trying to be more sustainable in their purchasing decisions. The top answer is avoiding fast fashion (60%), while related concepts such as considering the materials used (54%) and the location where the clothing is made (49%) also rank highly (see *Figure 6*). Production and delivery method (26% and 25%) are less commonly considered.

Figure 6. Factors considered by those who always/sometimes consider sustainability when purchasing clothing



Base: All who always/sometimes consider sustainability when purchasing clothing (n=981)

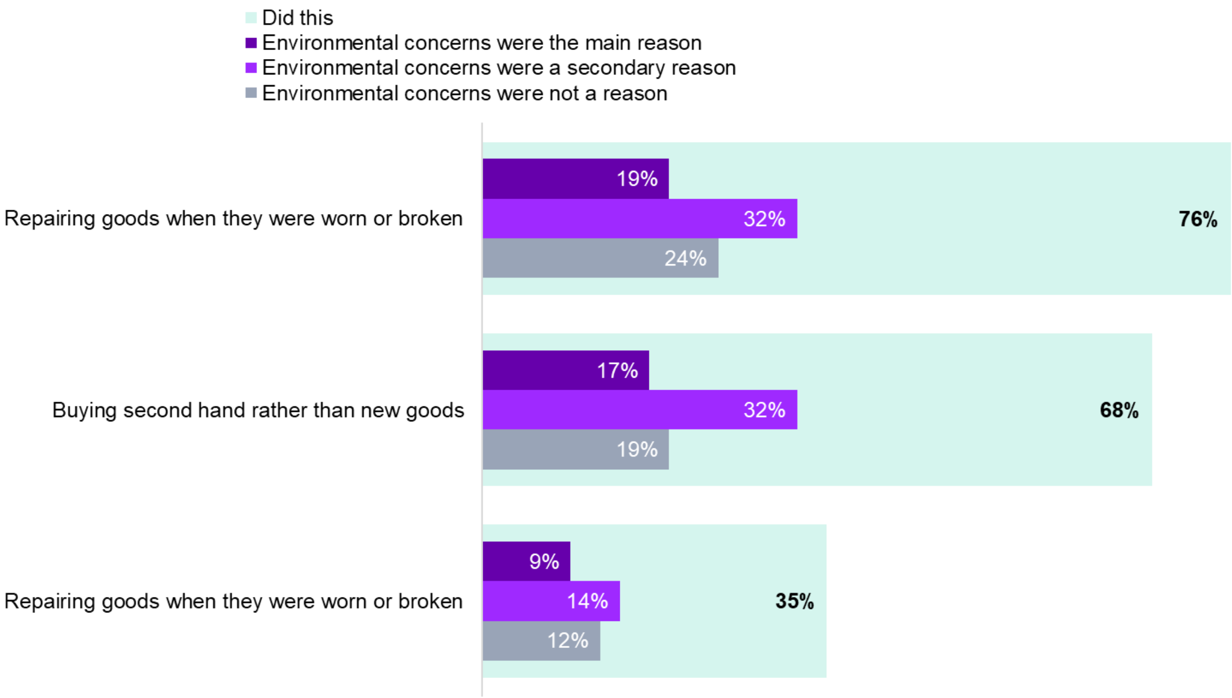
Other key considerations when it comes to consumers' purchasing behaviours relates to their attitudes towards reducing their overall consumption levels, for example by re-using, recycling or repairing the items they currently own. Respondents were therefore asked whether they had taken a number of actions in the last year focused on reducing their consumption and re-using/recycling products where possible, and if so, to what extent environmental concerns were a reason they did this.

Of the three purchasing behaviours listed in *Figure 7*, repairing goods when they were broken is the most common action taken, with three in four (76%) having done this in the last year. Just over half (52%) say that environmental concerns were a factor in their decision to do this, including one in five (19%) saying they were the main reason.

Buying second hand rather than new goods is also a common way in which people in Scotland try to be environmentally conscious in their purchasing decisions. Nearly seven in ten (68%) have done this in the last year, including 49% who say that environmental concerns were a reason for doing so. Leasing and borrowing products rather than buying is less common overall (35% have done this in the last year), with 22% saying that environmental factors influenced this.

Figure 7. Extent to which environmental factors influenced certain purchasing decisions in last year

The green bars in the chart below show the proportion of all respondents who made a purchasing decision, and the purple bars show the proportion of all respondents who made that decision because of environmental concerns. For example, 76% of all respondents repaired goods, and 19% of all respondents did so primarily because of for environmental concerns.



Base: All in Scotland (n=2,062)

Women are more likely to report doing all three of these for environmental reasons, including repairing worn/broken goods (58% vs. 45% of men), buying second hand rather than new (56% vs. 41%) and leasing/borrowing (26% vs. 19%). Younger respondents (aged under 35) are also more likely to report doing all three for environmental reasons (buying second hand: 65%; repairing worn/broken goods: 61%; leasing/borrowing: 34%).

Following on with the theme of reducing consumption, respondents were asked about their most recent incidence of purchasing four different items (clothing, a piece of furniture, an electronic device and a home appliance), and whether they were replacing another item or adding something new to their belongings.

Unsurprisingly, more expensive items are more likely to have been bought to replace another item. Seven in ten (70%) report that the last electronic device they bought was to replace another item, including 50% who said that this was specifically replacing another broken electronic device. Similar figures are seen for home appliances, with 69% saying the last one they bought was a replacement for another item, including

59% saying the previous item was broken. While people are more likely to report that the last item of clothing they bought was to replace another piece of clothing (54%), this is the only item listed where a sizeable minority report that they were adding something new to their belongings (39%) (see *Figure 8*).

Figure 8. Reason for last purchasing item across product categories

	Clothing	Furniture	Electronic device	Home appliance
Replacing an item that was broken	18%	32%	50%	59%
Replacing an item that was old or out of fashion	18%	16%	17%	8%
Replacing an item that no longer fit	18%	5%	2%	2%
Adding something new to my belongings	39%	22%	17%	14%
Net: Replacing	54%	53%	70%	69%

Those who say they are very/somewhat concerned about climate change are slightly less likely to report that the last item of clothing they bought was adding something new to their belongings than those less concerned (37% vs. 44%), though no difference exists for the other categories listed (e.g. furniture). Women are also more likely to say this about clothing (43% vs. 34% of men). Across all categories, younger people are more likely to say they were adding something new to their belongings, as are those in households earning at least £20,000 per year when compared to those in the lowest income bracket (<£20,000).

For all four products listed above, the most commonly reported action people took last time they broke or were damaged was to take it to their local authority's recycling centre (clothing: 20%, furniture: 35%, electronic device: 37%, home appliance: 39%). After this, the actions taken largely depend on the specific type of item. However, aggregating the proportion who said they either repaired it, recycled it, sold it or gave it away for free (i.e. didn't just dispose of it) shows that people are most likely to do this for furniture (86%), followed by home appliances (71%), electronic devices (66%) and clothing (65%).

The findings from this chapter are indicative of a lack of urgency among people in Scotland to alter their purchasing behaviours towards being more sustainable in the short term. Though a slight majority (52%) say that they are very/somewhat likely to change their purchasing habits in the next year as a result of environmental concerns, the proportion who are ‘very likely’ is only 10%, a figure which only rises marginally to 13% even among those who are very/somewhat concerned about climate change. These findings are reflected when looking at people’s current purchasing behaviours; across five product categories measured, only around 10% report ‘always’ considering sustainability when buying. Women, those aged under 25 and those in social grade ABC1 report higher propensity to consider environmental factors in their general purchasing behaviours, both now and in the future.

Purchasing online

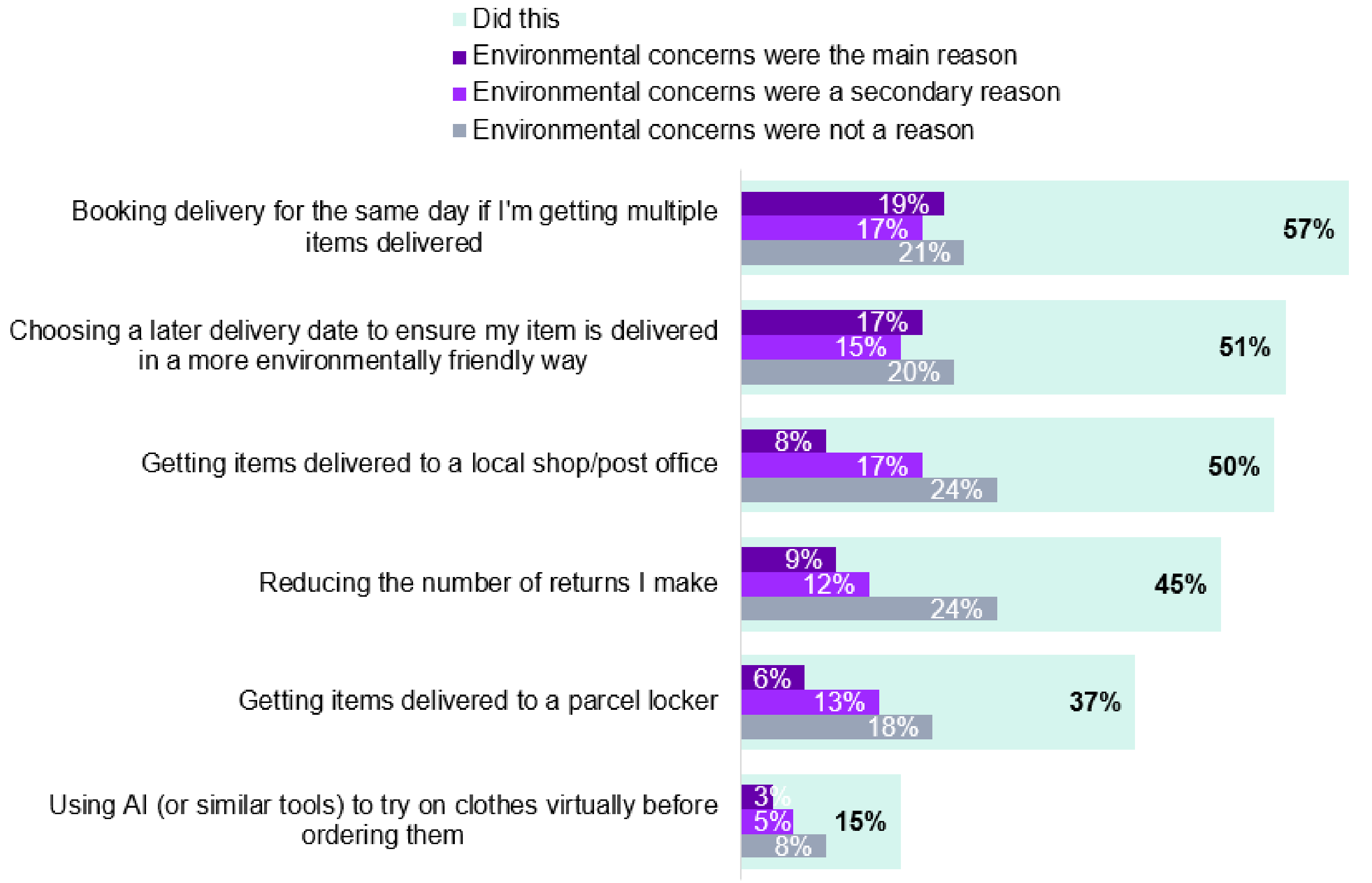
Overall, a majority (94%) of those living in Scotland have purchased products online within the last year. Only 5% report that they have not purchased anything online, a proportion higher amongst older age groups; one in eleven (9%) of those aged 55+ have not purchased any products online within the last year, compared with 3% of those aged 16-34.

Figure 9 shows that of those who purchased online products in the last year, over half (57%) book their delivery for multiple products for the same day, with 36% choosing to do so because of environmental concerns compared with 21% who say that environmental concerns are not a reason for doing this. It is more common for respondents to say they book delivery for multiple products for the same day primarily for environmental reasons (19%) than for any of the other purchasing decisions asked about.

The next most common purchasing decisions are choosing a later delivery date to ensure items are delivered in more environmentally friendly ways (51%) and getting items delivered to a local shop or post office (50%). Forty-five percent of respondents say they reduce the number of returns made, 37% get items delivered to a parcel locker, and 15% use AI to try on clothes virtually before purchasing them.

For more commonly taken purchasing decisions, a higher proportion of those who purchased online products in the last year say they do these due to environmental concerns. For example, respondents are most likely to choose a later delivery date (31%) or choose to get items delivered to a local shop (21%) due to environmental concerns, and are less likely to report this for trying on clothes virtually (8%). It is worth noting that the low proportion of people using AI tools, for environmental reasons or otherwise, could be attributed to their applicability only to purchasing decisions concerning certain clothing retailers, whilst other listed decisions may apply to a wide range of product categories.

Figure 9. Environmental concerns as a factor in making purchasing decisions



Base: All who purchased online products in the last year (n=1,931)

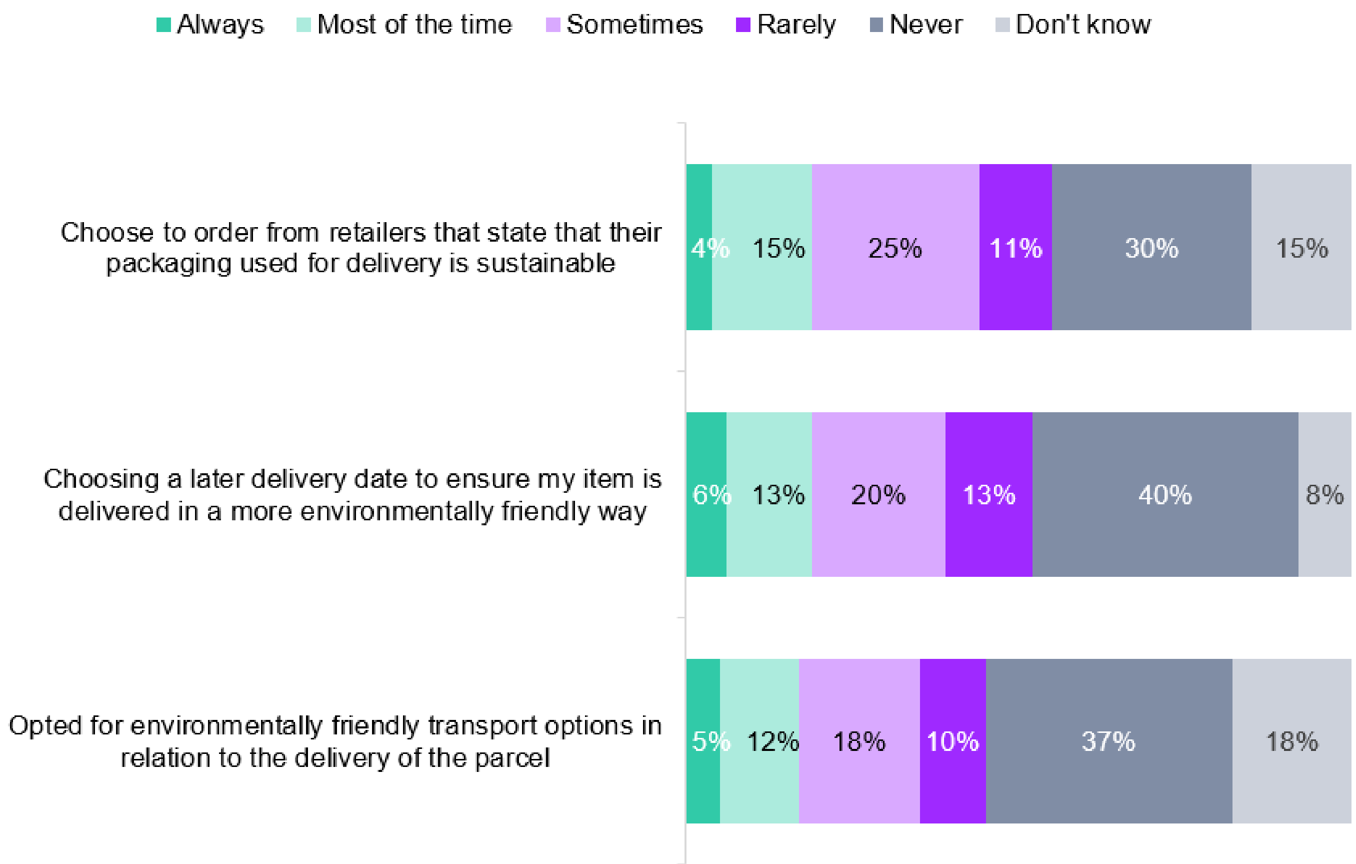
Just as younger people are more likely to buy products online than older age groups, they are also more likely to make all purchasing decisions as a direct result of environmental concerns compared with older age groups. The greatest differences between age groups are evident for decisions involving using new technologies or travelling away from home to pick up parcels. For example, 20% of those aged 16-34 use AI tools to try on clothes virtually, with 12% doing so for environmental reasons, compared with 13% of those aged 55+, with only 5% doing so for environmental reasons. Similarly, 52% of those aged 16-34 get their parcels delivered to lockers (29% for environmental reasons) compared with 28% of those aged 55+ (13% for environmental reasons). Three in five (60%) of those aged 16-34 get their parcels delivered to a local shop (37% for environmental reasons) compared with 42% of those aged 55+ (19% for environmental reasons).

Those who are concerned about climate change are equally as likely as those who are not to make most purchasing decisions. The exception is using AI to try on clothes virtually, which those who are not concerned about climate change are more likely to do (21% vs. 14% concerned). However, those concerned about climate change are more likely to make all decisions due to environmental concerns. For example, 38% of those concerned about climate change choose a later delivery date due to environmental concerns (vs. 9% of those not concerned about climate change), 23% get items delivered to a locker (vs. 6%) and 31% get items delivered to a local shop (vs. 9%).

Figure 10 shows that of those who purchased online products in the last year, over half (55%) say that they choose to order from retailers that state that their packaging used for delivery is sustainable (at least some of the time). This is similar to the proportion who choose a later delivery date to ensure their item is delivered in a more environmentally friendly way (52%) or who opt for environmentally friendly transport options in relation to the delivery of the parcel (45%). It is worth noting that there are relatively high don't knows for this question, in particular when thinking about whether people opt for environmentally friendly transport delivery options (18%).

Women are more likely to make purchasing decisions driven by environmental concerns more frequently than men. For example, 22% of women always or most of the time choose later delivery dates, compared with 15% of men. Similarly, 21% of women always or most of the time choose to order from retailers with sustainable packaging (compared with 16% of men), and 20% women always or most of the time opt for environmentally friendly transport options (compared with 13% of men).

Figure 10. Frequency of purchasing decisions driven by environmental concerns



Base: All who purchased online products in the last year (n=1,931)

Those who purchase online products were also asked whether they have spent more than they otherwise would have with an online retailer in order to qualify for free delivery in the last year. Half (51%) say they do this, compared with 44% who do not. Younger people are more likely than older age groups to say they spend more to qualify for free delivery, with three in five (59%) 16-34 year olds spending more compared with two in five (39%) of those aged 55+.

Furthermore, *Figure 11* shows that a majority (72%) of those who purchase products online say the ability to return an item bought online for free is an important consideration in their purchasing decision. Of these people, relatively equal proportions say free returns are very important (35%) or somewhat important (36%). Only one in eight (13%) say that free returns are *not* an important consideration when making purchasing decisions, with 8% saying free returns are not very important, and 5% saying free returns are not at all important.

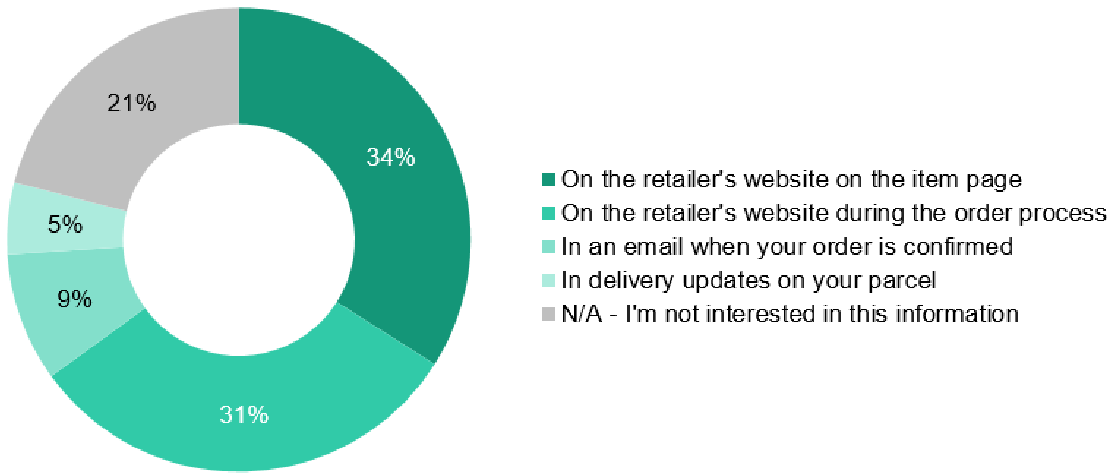
Figure 11. Importance of free returns in purchasing decisions

Base: All who purchased online products in the last year (n=1,931)

Four in five (79%) people who purchase products online say they have returned an item they purchased online before. When asked about the most recent time they returned an item bought online, respondents cited the most common reason as being that the item did not fit (38%). Additionally, around one in four returned an item because it was not as described or did not meet expectations (25%), or because the item was damaged or faulty (23%), highlighting the importance of free returns as a consumer protection measure. One in eleven (9%) returned an item because they changed their mind, with the same proportion (9%) returning an item because they purchased multiple sizes to try and returned those that were the wrong size. Seven percent ordered multiple sizes and returned those they didn't want, whilst 3% decided the item was too expensive.

Those who purchased products online in the last year were also asked where they would most want to see information on the carbon emissions related to their purchase when ordering online. Four in five (79%) are interested in seeing this information at some point during the ordering process, with 65% of respondents preferring to see this information *before* they made their decision; one in three (34%) report that they would prefer to see this information on the item page of the retailer's website, whilst 31% would prefer to see this information on the retailer's website during the order process (see *Figure 12*). Conversely, only 14% of respondents would prefer to see information relating to the carbon emissions of their process *after* they have made their order, with one in eleven (9%) preferring to see this information in an order confirmation email and 5% preferring to see it in delivery updates on their parcel. One in five (21%) are not interested in seeing information on the carbon emissions associated with their purchase during any stage of the online ordering process.

Figure 12. Preferred location of information on carbon emissions



Base: All who purchased online products in the last year (n=1,931)

Those who are not concerned about climate change are more likely to say they are *not* interested in seeing information on the carbon emissions relating to their online purchase compared with those who *are* concerned about climate change (59% not concerned vs. 9% concerned). The difference between these groups is particularly evident when looking at the preferred location of information; those concerned about climate change are more likely than those who are not to prefer to see information relating to the carbon emissions about their purchase *before* they make their purchasing decision (76% vs. 30% of those *not* concerned). Similarly, men are more likely than women to *not* be interested in seeing information on the carbon emissions relating to their online purchases (24% vs. 18% of women), as are older age groups compared with younger age groups (25% of those aged 35+ vs. 13% of those aged 16-34).

The findings from this chapter indicate that although a vast majority (94%) of people living in Scotland order products online, fewer people say they take environmentally friendly actions relating to their online purchasing habits. Furthermore, the proportion who say they are taking these actions primarily for environmental reasons is much lower, indicating that sustainability is not necessarily a strong driver of choices in the areas discussed in this chapter. Women, young people, and those concerned about climate change are more likely to make most environmentally friendly actions, as well as to make these actions more frequently. They are also more interested in seeing information on the carbon emissions related to their online purchases, particularly in locations seen *before* they have made their purchasing decisions (e.g., on the retailer's website on the item page). Encouraging those less likely to make sustainable choices to engage in these behaviours should therefore be a key priority in the journey to ensuring sustainable online purchasing behaviours are a norm across society.

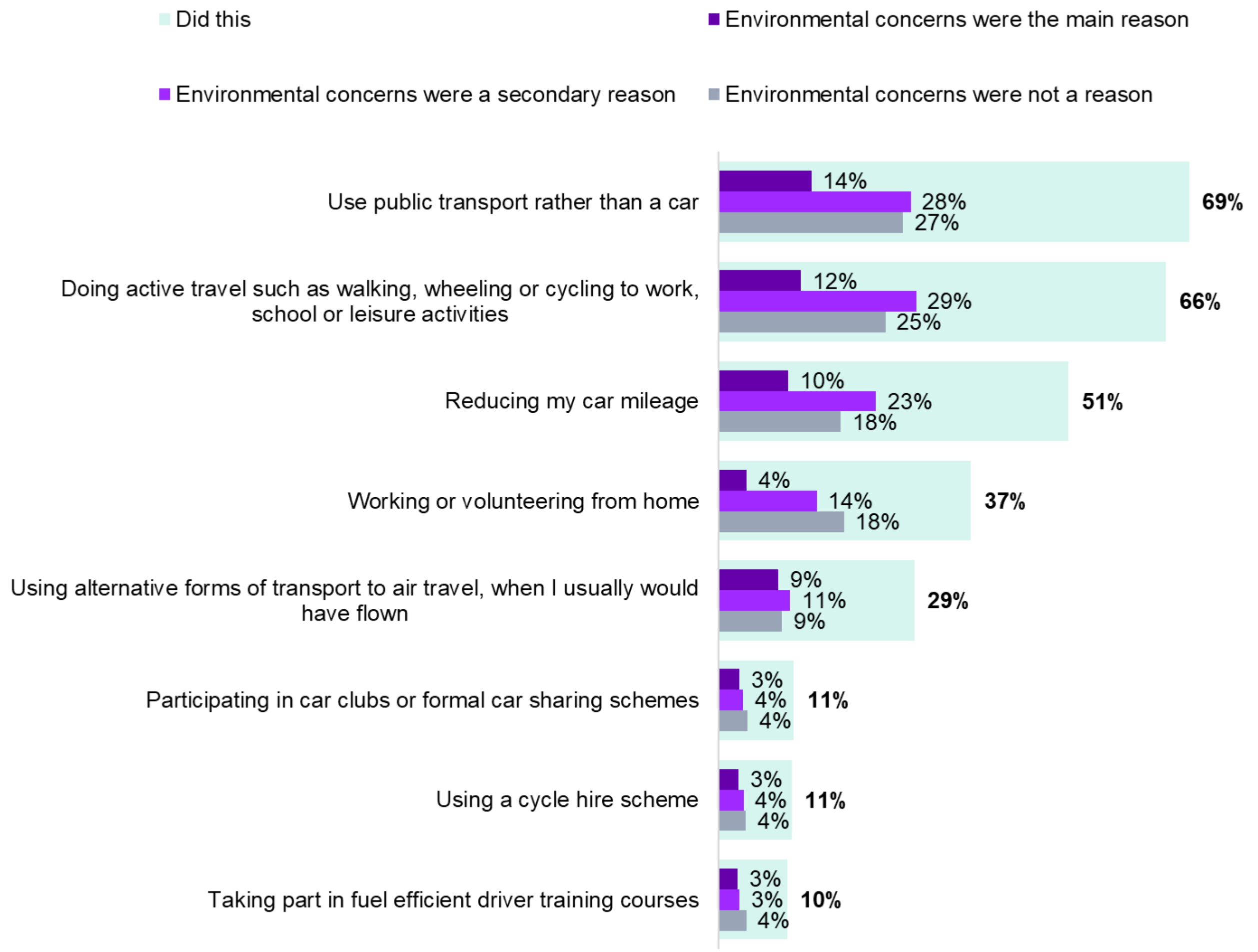
Transport

When considering the sustainable transport behaviours of those living in Scotland, the most common behaviour is using public transport rather than a car with seven in ten (69%) who do this. This is followed by two in three (66%) who do active travel such as walking, wheeling or cycling to work, school or leisure activities and half (51%) who reduce their car mileage. Comparatively fewer participate in car share or cycle hire schemes (11% for both) or take part in fuel efficient driving training courses (10%).

Despite the majority using public transport rather than a car (69%) and doing active travel (e.g. walking or cycling) (66%), approximately two in five do these as a result of environmental concerns (42% and 41% respectively). As shown in *Figure 13*, there is a similar pattern among those who have reduced or are trying to reduce their car mileage, use alternative forms of transport to air travel and working or volunteering from home, with fewer doing so for environmental reasons. This suggests that other reasons such as cost or preference for other travel methods are important when considering transport behaviours.

When considering sustainable transport behaviours carried out for non-environmental reasons, using public transport rather than a car (27%) and doing active travel (25%) are more commonly selected. Following this is working or volunteering from home (18%) and reducing car mileage (18%). Sustainable transport behaviours less likely to be carried out for non-environmental reasons include using alternative forms of transport to air travel (9%), participating in car clubs or formal car sharing schemes (4%), taking part in fuel efficient driver training courses (4%) and using a cycle hire scheme (4%). Notably, differences here are in part due to certain behaviours being more common overall.

Figure 13. Environmental concerns as a factor in sustainable transport behaviours



Base: All in Scotland (n=2,062)

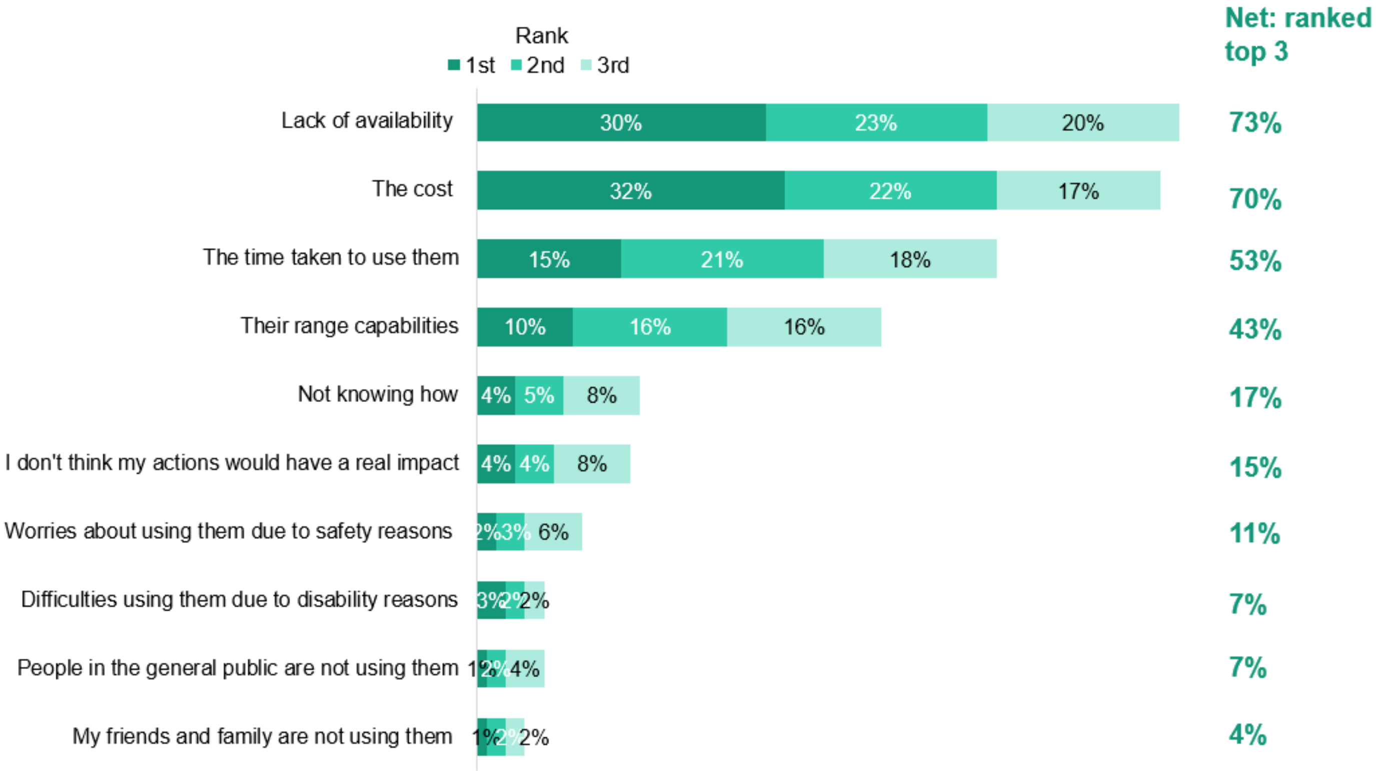
Younger people are more likely to report doing each transport behaviour apart from reducing their car mileage and are subsequently more likely to report environmental concerns as a reason for these actions. Those from higher social grades (ABC1) are also more likely to do active travel compared with those from lower social grades (72% vs. 61% C2DE), along with using public transport (76% vs. 64%), using alternative forms of transport to air travel (33% vs. 26%), reducing car mileage (55% vs. 48%) and working or volunteering at home (47% vs. 29%).

Around two in three (65%) of those living in Scotland would like to reduce the carbon emissions from the transport methods they use, while 15% would not like to and 20% are unsure. Following their higher likelihood to carry out most sustainable transport behaviours, young people are most likely to say they would like to reduce their carbon emission (74%) compared with three in five (61%) of those aged 35+. This is the result of those aged 35+ being more likely to be unsure (23% vs. 13% of those aged 16-34) as opposed to not wanting to, suggesting the lower likelihood may be due to them being unaware of what is necessary to reduce their carbon emissions. Those from a higher social grade are more likely to report wanting to reduce their carbon emissions from transport methods compared with those from lower social grades (72% vs. 59%) along with those who do not have a disability or long-term health condition compared with those with one (66% vs. 58%).

As shown in *Figure 14*, among those who say they would like to reduce carbon emissions from the transport methods they use, the most common reasons for *not* choosing transport methods with lower environmental impact is cost (32% ranked it 1st) and lack of availability (30%). Following this, time taken to use them was ranked within the top three by half (53%) while their range capabilities was ranked within the top three by two in five (43%). Not knowing how to (17%) and thinking actions won't have an impact (15%) were less likely to be ranked in the top three. Concerns about using them due to safety reasons were ranked in the top three by 11%. Following this, difficulties using them due to disability reasons was ranked in the top three by 7% overall, however, increases to 38% of those with a disability or long-term health condition, with 16% ranking it 1st. Similarly, friends, family and the general public not using them were also lowly ranked as a reason to not choose transport methods with lower environmental impact, with only 4% ranking this in the top 3.

Figure 14. Reasons to not choose transport methods with a lower environmental impact

Participants were asked to rank the top three reasons. The stacked columns shown how often each option was ranked 1st, 2nd and 3rd, and the right-hand side of the chart shows how often these options were selected in the top three.



Base: Those who would like to reduce the carbon emissions from the transport methods they use (n=1,336)

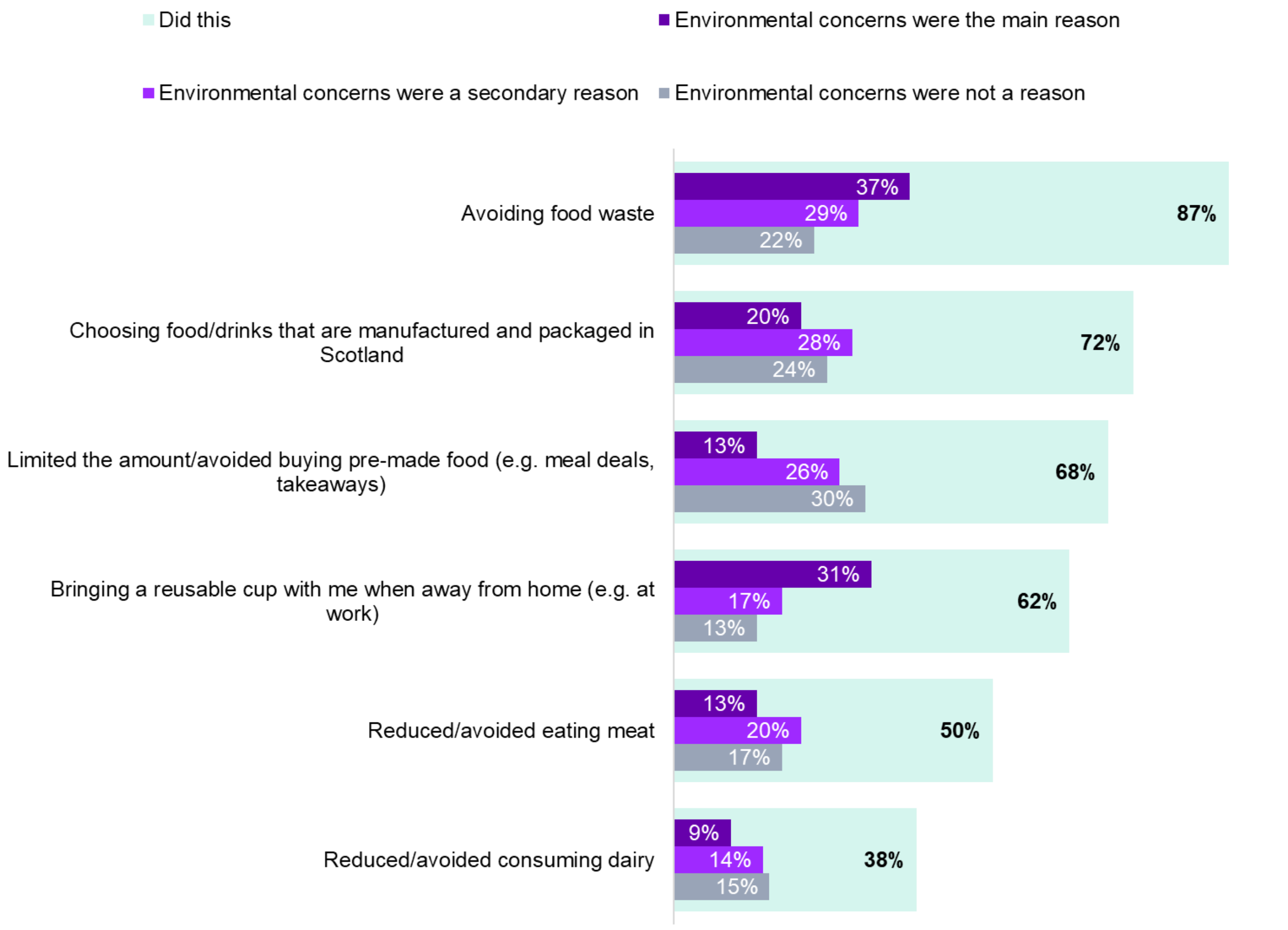
These findings highlight that adults in Scotland are already carrying out sustainable travel behaviours including using public transport, active travel and reducing car mileage. However, reflecting previous findings, the majority state environmental concerns as a secondary reason or not a reason at all for their sustainable behaviours. This implies other factors including cost or accessibility are prioritised by consumers. Among those who are willing to reduce carbon emissions from their transport methods, the main reasons for *not* doing so are perceptions of cost, availability and time taken for transport methods with a lower environmental impact.

Food and drink

The majority of adults in Scotland carry out most sustainable food and drink habits listed, including avoiding food waste (87%) and choosing food/drinks that are manufactured and packaged in Scotland (72%). Following this is limiting or avoiding buying premade food (68%) and bringing a reusable cup away from home (62%). Reducing or avoiding eating meat (50%) or dairy (38%) are less commonly selected, however still a large proportion. As shown in *Figure 15*, a smaller proportion report environmental concerns as a reason to carry out each behaviour, with two in three (65%) avoiding food waste due to environmental concerns, followed by around half (48%) who bring a reusable cup or choose food or drinks that are manufactured/packaged in Scotland. There is a similar pattern among those who limit or avoid buying pre-made food, reducing or avoiding eating meat or dairy. This suggests that other reasons such as ease, cost and health play a role in sustainable food habits.

Demonstrating this, when considering the sustainable food and drink behaviours adults in Scotland carry out (but *not* due to environmental concerns), three in ten (30%) report limiting the amount or avoiding buying pre-made food (30%), a quarter (24%) report choosing food/drinks that are manufactured and packaged in Scotland while one in five (22%) report avoiding food waste. Reducing or avoiding meat (17%) or dairy (15%) or bringing a reusable cup (13%) are less likely to be carried out for non-environmental reasons. However, differences here are in part due to certain behaviours being more common overall.

Figure 15. Environmental concerns as a factor in sustainable food habits



Base: All in Scotland (n=2,062)

Women are more likely than men to carry out certain sustainable food and drink behaviours including reducing or avoiding eating meat (54% vs. 46%), bringing a reusable cup (70% vs. 54%), limiting the amount or avoiding buying pre-made food (72% vs. 65%) and avoiding food waste (89% vs. 85%). Among those who carry out these actions, men are more likely to say environmental concerns were *not* a reason to avoid food waste (26% vs. 17%) and choose food or drinks that are manufactured and packaged in Scotland (27% vs. 22%).

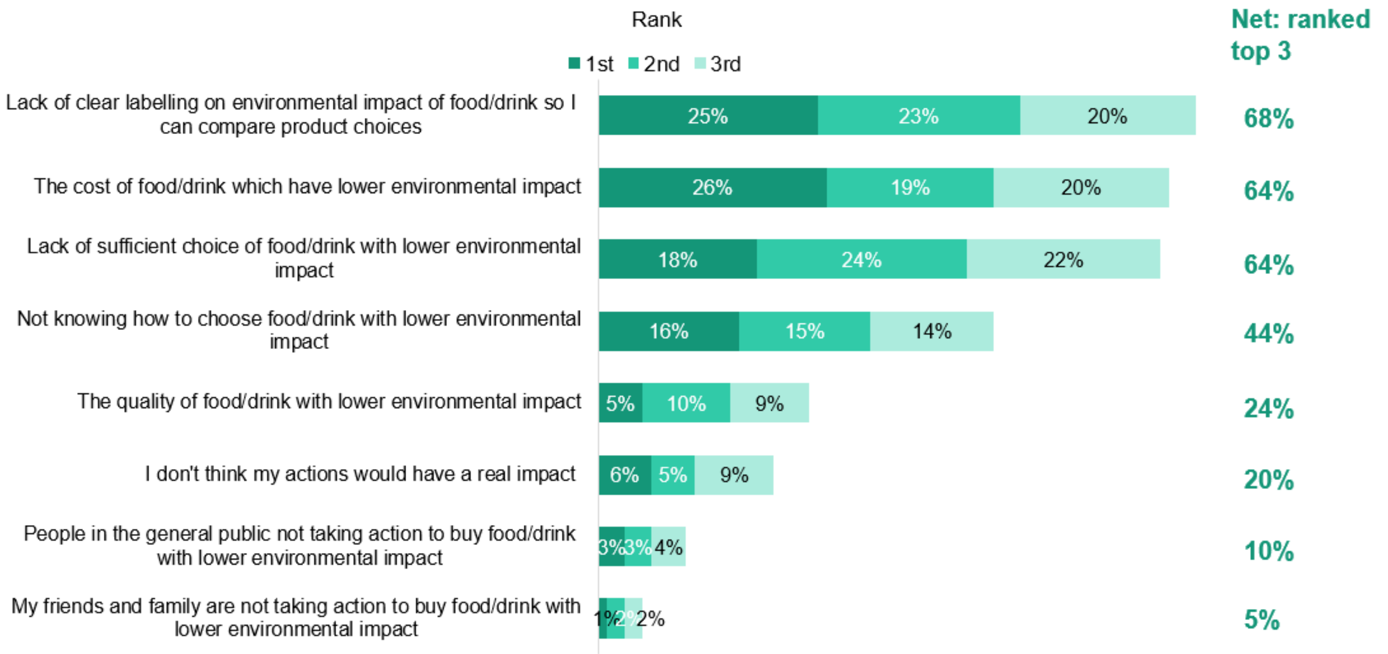
Those who are younger (16-34) are more likely to reduce/avoid meat (58%) and dairy (48%) and bring a reusable cup (78%) than older age groups. Despite similar proportions avoiding food waste and choosing food/drink manufactured in Scotland, those aged 35+ are more likely than younger respondents (16-34) to say that environmental concerns were *not* their reason for these actions (24% avoiding food waste, 26% choosing food/drink manufactured in Scotland).

When considering reasons for not doing certain behaviours, the main reason given for not reducing or avoiding eating meat or dairy is because it is not appealing; approximately three in five (60% for meat and 56% for dairy) state this, followed by approximately one in four (25%) for dairy and one in five (21%) for meat who haven't thought about it. Similarly, approximately one in three don't bring a reusable cup (36%) or limit/avoid buying pre-made food (35%) because they haven't thought about it, while two in five (43%) don't avoid food waste for this reason. This suggests that – except for reducing or avoiding eating meat or dairy – the main reason for not engaging in sustainable food and drink behaviours is due to a lack of consideration, as opposed to actively avoiding it.

Three in five (61%) adults in Scotland would like to reduce the carbon emissions from the food and drink they buy, 15% would not like to and one in four (24%) don't know. Reflecting men's lower uptake of sustainable food behaviours, they are more likely to *not* want to reduce the carbon emissions from food and drink they buy (19% vs. 11%), as are those from a lower social grade (18% C2DE vs. 11% ABC1). Similar to reducing carbon emissions for transport methods, more young people want to reduce their carbon emissions from food and drink (67% vs. 59% of those aged 35+), while those aged 35+ are more likely to feel unsure (26% vs. 18% of 16-34s).

As shown in *Figure 16*, among those who would like to reduce the carbon emissions from food and drink they buy, approximately two in three (68%) rank a lack of clear labelling on environmental impact of food/drink packaging so they can compare product choices as a reason for not taking more action. This is followed by 64% who selected both a lack of sufficient choice of food/drink with lower environmental impact and the cost of these products. The cost of products with a lower environmental impact is more likely to be selected as a reason to not take more action by those who are younger (70% of 16-34s vs. 54% of those aged 55+) and by women (67% vs. 60% of men). Those who would like to reduce the carbon emission from food and drink are less likely to report people in the general public or friends and family not taking action (10% and 5% respectively) as reasons for not taking more action.

Figure 16. Main reasons for not taking more action to reduce the carbon emissions from any food and drink



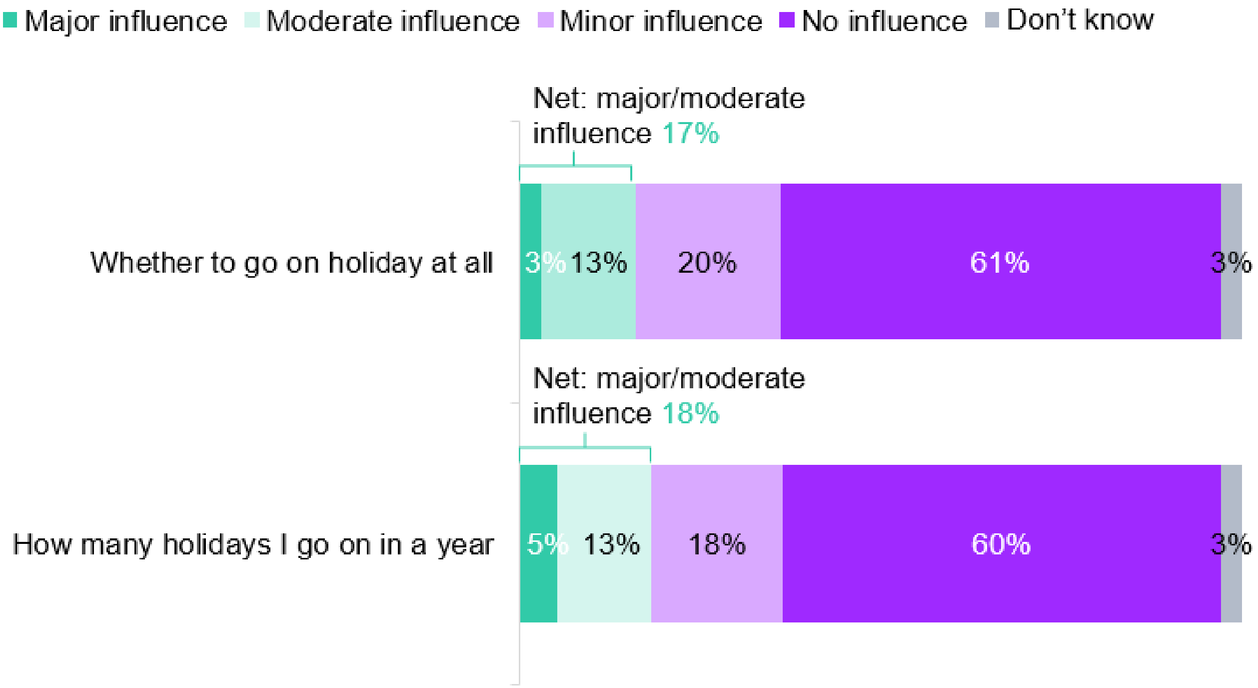
Base: Those who would like to reduce the carbon emissions from the food and drink they buy (1,283)

The findings in this chapter demonstrate that the majority of adults in Scotland carry out some form of sustainable food and drink behaviours including avoiding food waste, choosing food/drinks manufactured and packaged in Scotland and limiting or avoiding buying pre-made food. Similar to other consumer behaviours, the majority state environmental concerns are a secondary reason (or not a reason at all) for doing these sustainable food or drink behaviours. This suggests reasons such as ease, cost and health are a key driving force in these decisions instead. When considering the main reasons for not taking more action to reduce carbon emissions from food and drink, consumers report a perceived lack of products which give information on their environmental impact, while a lack of choice and the cost of more environmentally friendly food and drink are also commonly cited.

Tourism

The vast majority (94%) of those in Scotland have been on holiday at some point, either in the UK or abroad. *Figure 17* shows that of those who have been on holiday, one in six (17%) say that environmental concerns play a notable (major or moderate) role in influencing their decision to go on holiday, with 3% saying environmental concerns play a major role, and 13% a moderate role. One in five (20%) say environmental concerns play a minor role in influencing their decision to go on holiday. Three in five (61%) say environmental concerns do not influence their decision to go on holiday at all. A similar proportion of people in Scotland (who have been on holiday) say that environmental concerns influence their decisions of how many holidays they go on in a year, with 18% saying environmental concerns play a notable (major or moderate) role, 5% saying a major role, 13% a moderate role, 18% a minor role, and 60% no influence at all.

Figure 17. Influence of environmental concerns on decisions of whether to go on holiday



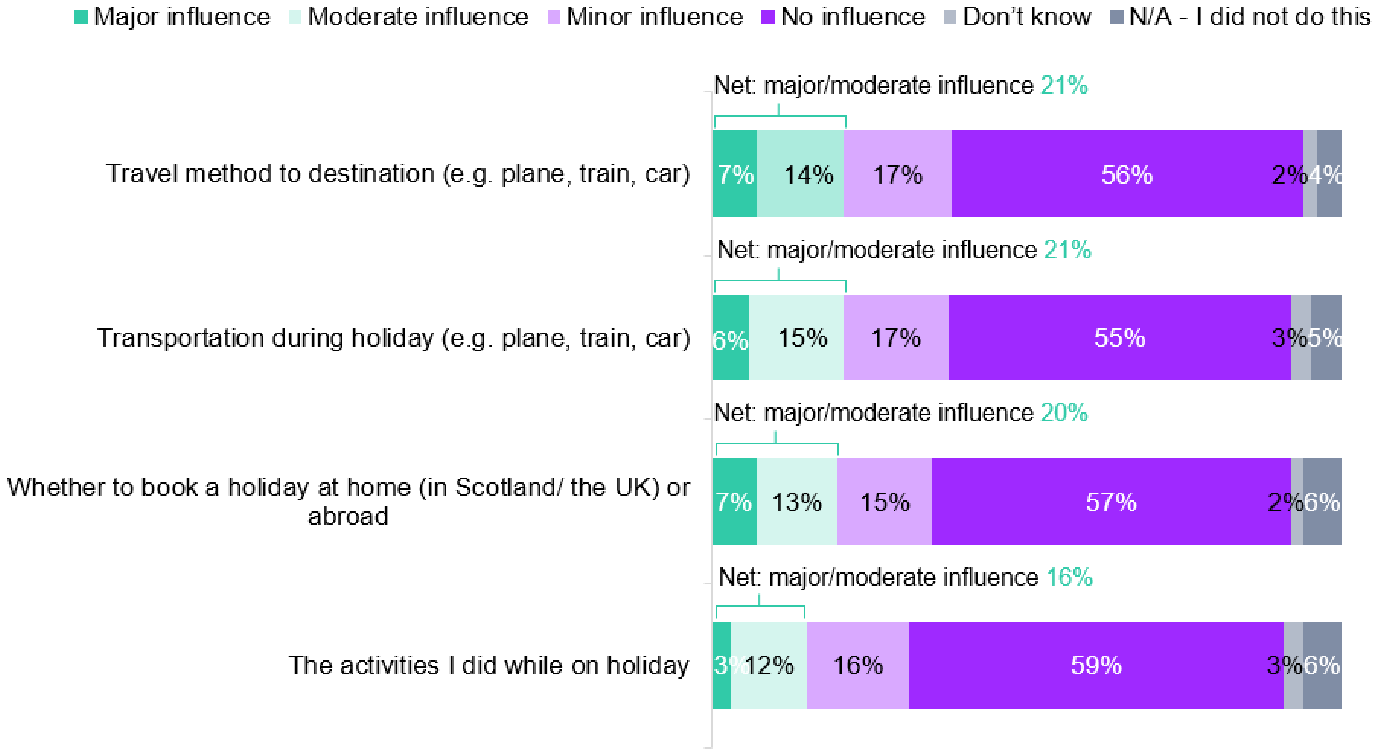
Base: All who have been on holiday (n=1,942)

Those who are concerned about climate change are more likely than those not concerned to say that environmental concerns play a major or moderate influence on both their decision of whether to go on holiday at all (21% concerned vs. 2% not concerned), and how many holidays to go on in a year (23% concerned vs. 2% not concerned).

Figure 18 shows that of those who go on holiday, one in five say that environmental concerns notably (majorly/moderately) influence their decisions regarding travel method to the destination (21%, 7% major, 14% moderate), transportation during their holiday (21%, 6% major, 15% moderate), and whether their holiday is domestic or international (20%, 7% major, 13% moderate). One in six (16%) say that environmental concerns notably influence the activities they do on holiday (3% major, 12% moderate).

However, for most people environmental concerns do not impact their travel decisions; 17% say that environmental concerns play a minor influence when choosing both their travel method to a destination, and during their holiday, with over half saying environmental concerns do not influence these decisions at all (56% travel to, 55% travel during). Similarly, 15% say that environmental concerns play a minor influence in choosing whether to book a domestic or international holiday, whilst 57% say environmental concerns do not influence this decision at all. Sixteen percent say that environmental concerns play a minor influence when choosing their holiday activities, whilst 59% say environmental concerns do not influence this decision at all.

Figure 18. Influence of environmental concerns on decisions about holidays



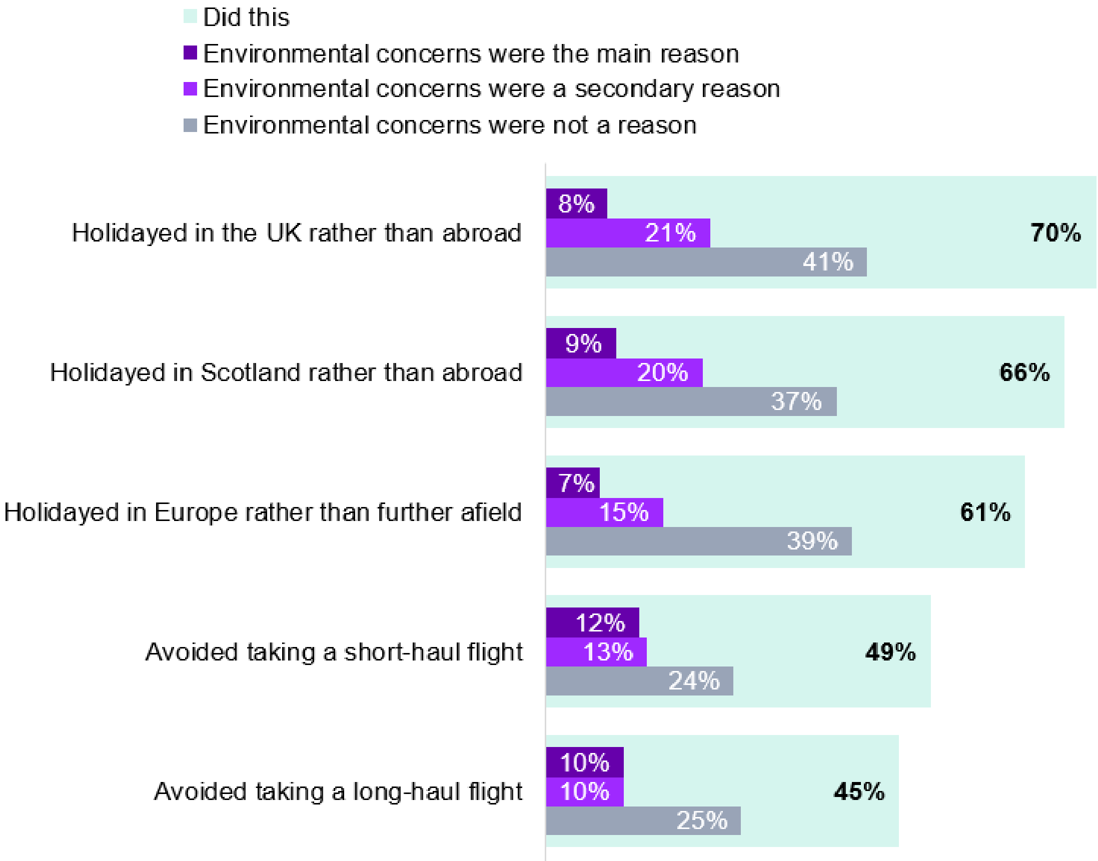
Base: All who have been on holiday (n=1,942)

In line with other findings in this report, those who are concerned about climate change are more likely than those not concerned to say that environmental concerns play a major or moderate influence on all decisions, including their travel method to a destination (27% concerned vs. 2% not concerned), their transportation during the holiday (26% concerned vs. 2% not concerned), whether they book a domestic or international holiday (25% concerned vs. 2% not concerned), and what activities they do on holiday (20% concerned vs. 1% not concerned).

Of those who have been on holiday, 70% holidayed in the UK rather than abroad, with 30% of all respondents choosing to do so because of environmental concerns (see *Figure 19*). This holiday decision has the highest proportion of people choosing to do so primarily for environmental reasons, with 8% citing environmental concerns as the primary reason for their decision. The next most common holiday decision is holidaying in Scotland rather than abroad (66%), followed by holidaying in Europe rather than further afield (61%), avoiding taking a short-haul flight (49%), and avoiding taking a long-haul flight (45%). The proportion of people making these decisions largely correlates with the proportion of those who do so due to environmental concerns; 29% holiday in Scotland rather than abroad as a direct result of environmental concerns, followed by 22% holidaying in Europe rather than further afield, 25% avoiding taking a short-haul flight, and 20% avoiding taking a long-haul flight.

However, for every listed action, a greater proportion of respondents report that environmental concerns were *not* a reason for taking this action than report that they *were*. This is particularly evident when considering holiday destinations, with 41% of respondents reporting that environmental concerns were *not* a reason for holidaying in the UK rather than abroad, 37% reporting this for Scotland, and 39% for Europe. These findings indicate that other, non-environmental-related considerations such as value for money play important roles in shaping holiday-makers' decision making, highlighting that convenient and environmentally friendly travel options are key to encouraging people to travel more sustainably.

Figure 19. Environmental concerns as a factor in holiday decisions



Base: All who have been on holiday (n=1,942)

Younger people are more likely to make most holiday decisions as a direct result of environmental concerns compared with older age groups. For example, 56% of those aged 16-34 avoid taking short-haul flights, with 36% doing so for environmental reasons, compared with 45% of those aged 55+, with 20% doing so for environmental reasons. Similarly, 33% of those aged 16-34 holiday in Scotland rather than abroad for environmental reasons compared with 26% of those aged 55+; 36% of those aged 16-34 holiday in the UK rather than abroad for environmental reasons compared with 26% of those aged 55+; and 30% of those aged 16-34 holiday in Europe rather than further afield for environmental reasons compared with 18% of those aged 55+.

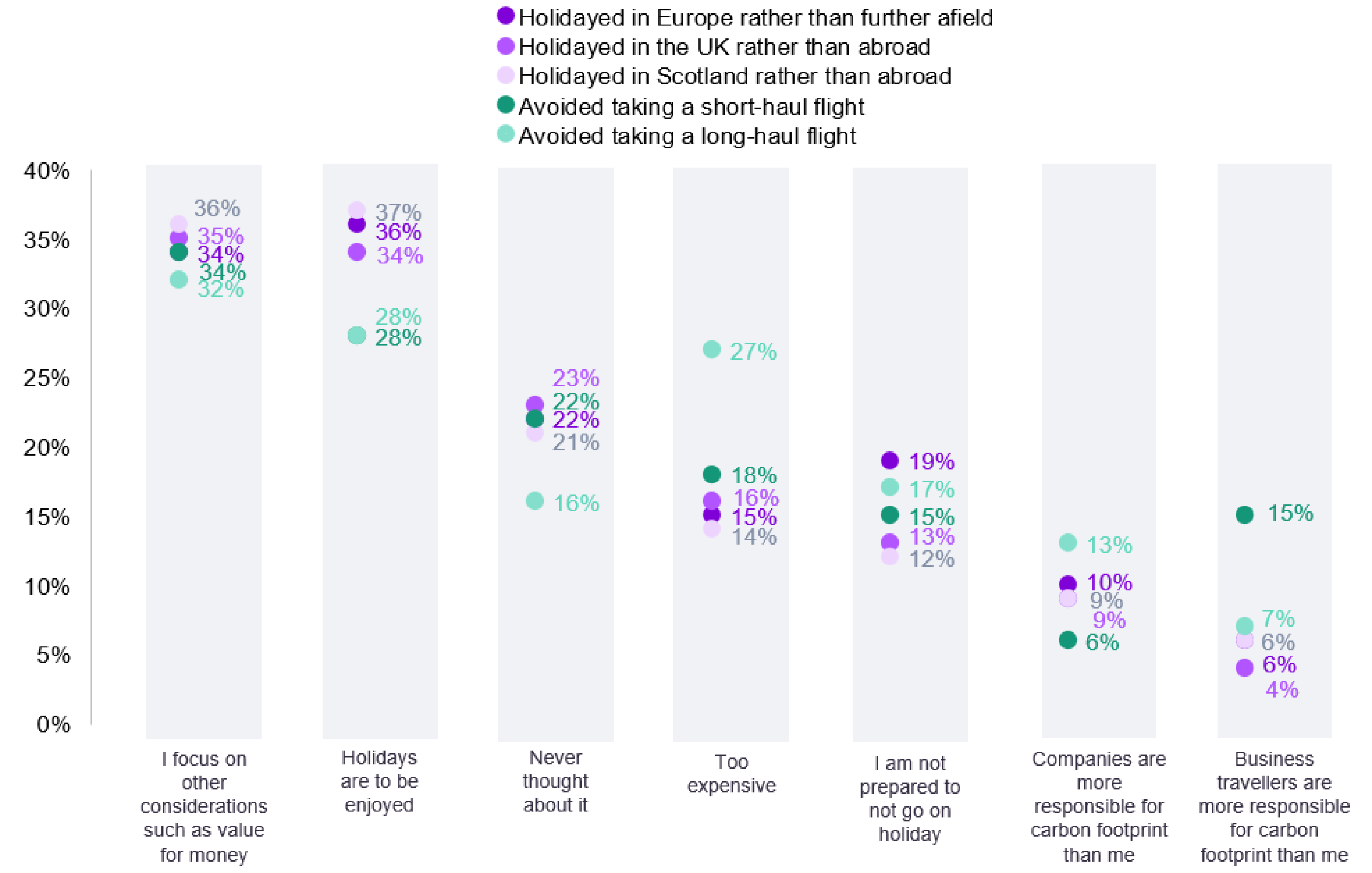
Those from ethnic minority backgrounds are more likely than those from white backgrounds to holiday in the UK (85% vs. 70% of white respondents) rather than traveling abroad, and are also more likely to do so because of environmental concerns, with 42% of those from ethnic minority backgrounds holidaying to Scotland for this reason (compared with 28% white), and 43% holidaying in the UK for this reason (compared with 29% white).

Those who are concerned about climate change are more likely than those who are not to make most holiday decisions asked about, as well as to make these decisions because of environmental concerns. For example, 25% of those concerned about climate change avoid taking a long-haul flight due to environmental concerns (vs. 4% of those not concerned about climate change), 31% avoid taking a short-haul flight (vs. 5%), 36% holiday in Scotland (vs. 5%), 37% holiday in the UK (vs. 6%), and 27% holiday in Europe (vs. 6%).

Those who took these actions, but not for environmental reasons, were asked about their reasons for saying this. *Figure 20* shows that the most common reason was that people have other considerations such as value for money which they value higher than environmental concerns. For example, 36% of those who report having holidayed in Scotland *(*but not for environmental reasons) say this, while the corresponding figure for holidaying in the UK is 35%, and for Europe 34%. Similarly, many say that taking more environmentally friendly actions would have been too expensive, with 27% of people avoiding taking long-haul flights for this reason and 18% avoiding taking short-haul flights for this reason.

Figure 20. Reasons for environmental concerns not being a reason for action

Along the x-axis of the chart below are reasons why people may have not *cited environmental concerns as a reason to take actions to reduce the carbon emissions associated with their holidays. The data points represent the proportions of people who did not consider environmental concerns when taking these actions for the reason on the x-axis.*



Base: All for whom environmental concerns were not a reason for action (Holidayed in Europe n=755; holidayed in the UK n=812; holidayed in Scotland n=749; avoided short-haul flights n=473; avoided long-haul flights n=498)

Younger people are more likely than older age groups to say that environmental concerns are not a reason to make environmental travel decisions, because they feel companies and business travellers are more responsible for their carbon footprint than leisure travellers. For example, 12% of 16-34 year olds do not holiday in Scotland rather than abroad due to environmental concerns because they believe business travellers are more responsible, and 21% because they believe companies are more responsible (compared to 3% and 4% of those aged 55+, respectively). Similarly, one in five (21%) 16-34 year olds do not choose to holiday in the UK rather than abroad for environmental reasons because they believe that companies are more responsible for reducing carbon emissions than leisure travellers, whilst 9% believe business travellers are more responsible (compared to 5% and 3% of those aged 55+, respectively).

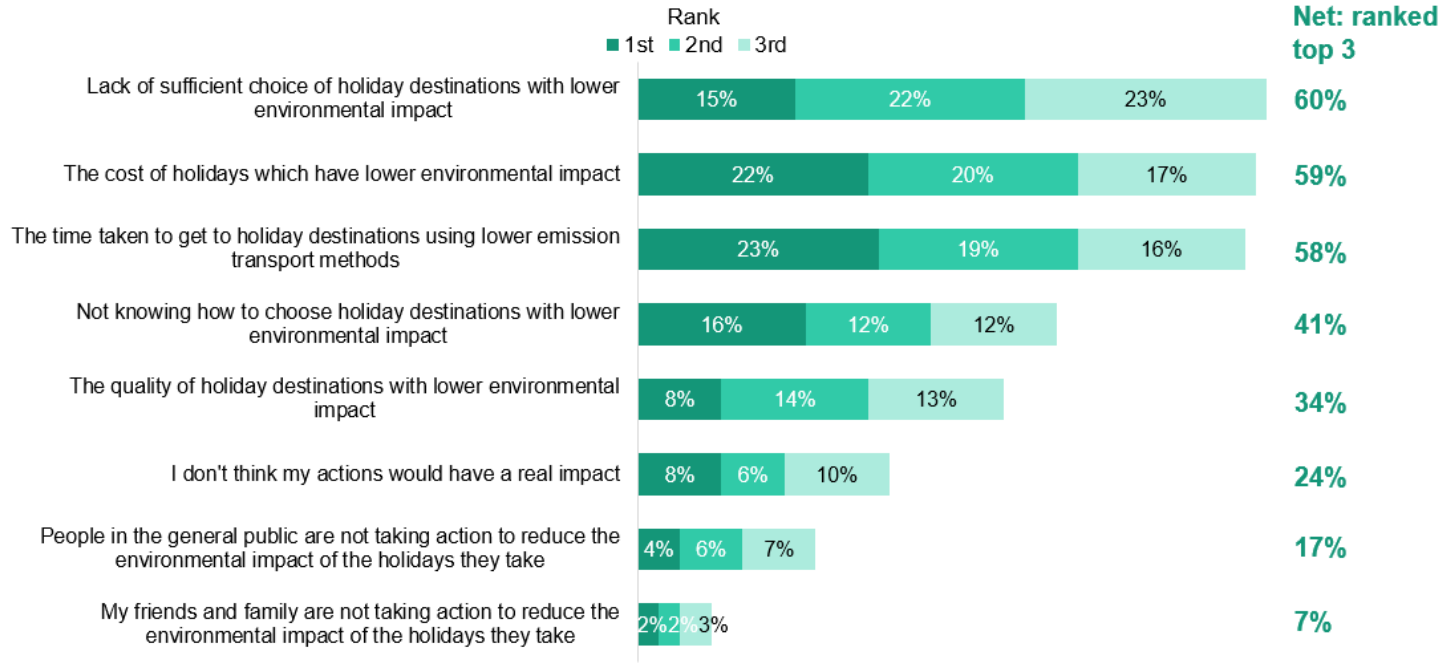
People living in Scotland were also asked whether they would like to reduce the carbon emissions related to their holidays. Of those who have been on holiday, half (51%) would like to reduce associated carbon emissions, whilst one in five (20%) would not. One in three (29%) do not know.

Those who are concerned about climate change are more likely than those who are not concerned to want to reduce the carbon emissions related to their holidays (63% vs. 12% not concerned). Conversely, men are more likely than women to *not* want to reduce their holiday-related carbon emission (25% vs. 16% women), as are those of a lower social grade compared with those of a higher social grade (22% C2DE vs. 18% ABC1).

Those who would like to reduce their holiday-related carbon emissions were asked to rank the top three reasons why they have not taken more action to do so. *Figure 21* shows that the highest-ranked reason is that there is a lack of sufficient choice of holiday destinations with a lower environmental impact, with three in five (60%) ranking this in their top three reasons and 15% ranking it as their top reason. Three in five also ranked the reasons that holidays with lower environmental impact are more costly (59%, 22% ranked 1st), and that travelling using lower emission transport takes longer (58%, 23% ranked 1st) as one of the top three reasons for not taking more action.

Less common reasons include a lack of knowledge of how to choose holiday destinations with lower environmental impact (41%, 16% ranked 1st) and a lower quality of holiday destinations with lower environmental impact (34%, 8% ranked 1st). The least common reasons involve travellers abstaining themselves of responsibility to reduce carbon emissions, for example by thinking their actions do not have real impact (24%, 8% ranked 1st), by believing that the general public are not taking action (17%, 4% ranked 1st), or by believing that their friends and family are not taking action (7%, 2% ranked 1st).

Figure 21. Top reasons for not taking more action to reduce holiday-related carbon emissions



Base: All who would like to reduce carbon emissions related to holidays (n=1,012)

Similar to other sections of this report, this chapter indicates that environmental sustainability is not currently a strong driver of tourism-related decisions. Only around one in six say that environmental concerns play a major or moderate role in influencing their decisions of whether to go on holiday and how often they do so. Similarly low proportions report that environmental concerns are important considerations when deciding which destinations to visit, how to get there, and what activities to do upon arrival. Furthermore, people in Scotland commonly report that environmental concerns are *not* a reason for taking environmentally friendly actions, which are instead driven by other considerations such as value for money. Significant work is therefore needed to raise awareness that more environmentally friendly travel options need not compromise the enjoyment or cost of a holiday, nor an individual's right to travel, in order to keep Scotland's Net Zero targets on track.

Conclusions

Worries about climate change among people living in Scotland are relatively high overall: 76% report being concerned, including 34% who are very concerned. However, this concern is not driving people towards taking action to make their consumer behaviours more sustainable, whether in their current purchasing habits or their planned future choices. For example, across five listed product categories, only around one in ten (10%) report that they always avoid non-recyclable/single-use plastics, even though up to half report always or sometimes doing so. This indicates that although there are occasional efforts to make more sustainable choices, sustainability is not an integral factor in people's consumption decisions. Similarly, although 52% say they plan to make changes to their purchasing habits to be more sustainable in the next year, the proportion saying they are very likely to do so is again only 10%. Even among those 'very concerned' about climate change, this figure only rises to 23%, indicating a lack of urgency among people in Scotland about the need to be more sustainable in their purchasing choices in the short-term.

This is likely linked to a perception that governments, businesses and regulators hold much more responsibility for reducing carbon emissions in Scotland than individual consumers. Of the entities listed in the survey, only 15% said that consumers should be the 1st or 2nd most responsible for reducing emissions, with the majority ranking them last (59%). The data here sends a strong message that for consumers to commit to changing their behaviours in a real and impactful way in the long-term, systemic action at the levels of government and industry are likely to be a prerequisite.

A similar pattern is seen in the analysis of specific consumer markets. Food and drink and transport in particular are areas where large proportions say they want to reduce the carbon emissions related to their consumption, with majorities reporting having already taken a number of the actions listed within these markets associated with more sustainable consumption. However, the proportions who say they are doing these things primarily for environmental reasons are much lower, indicating that sustainability is not necessarily a strong driver of choices in these areas.

In contrast, across all four consumer markets analysed (online purchasing, food and drink, transport and travel), factors such as cost, convenience and accessibility are currently higher priorities for consumers in terms of their choices. This is particularly evident in the analysis of online purchasing and tourism, where sustainable consumption behaviours are less prevalent. Policy measures that align sustainable options with these other priorities, both in real and perceived terms, will therefore be key to gain consumer buy-in. Similarly, there is a sense across industries that consumers lack information on how to make more environmentally friendly product choices, a finding that aligns with the low levels of reported knowledge overall in terms of what people need to do to help Scotland reach Net Zero by 2045.

Finally, it is clear that sustainable consumption is a behaviour which is much more prevalent among certain groups, namely younger people, women and those in higher social grades. Addressing the deficit among those less likely to make sustainable choices should therefore be a key priority if sustainable consumption behaviours are to become the norm across society.