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*Climate Action Wales
Behavioural Tracking
Survey 2023*

Baseline Survey Report



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SBW Advertising/ Welsh Government

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Climate Action Wales Behavioural Tracking Survey 2023

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1. Introduction and objectives

Beaufort was commissioned by SBW Advertising in the summer of 2023 to conduct a survey assessing:

- Current public behaviour around actions to help tackle climate change.
- Public willingness to adopt specific behaviours in future.
- Knowledge of actions to help tackle climate change.
- Where there is action, which specific steps are being taken.
- Where there is no action, what are the main barriers to doing so.
- Perceptions of which actions will have the biggest impact on climate change.

The 2023 survey was designed to provide baseline data ahead of the launch of the main phase of the Climate Action Wales communications campaign for Welsh Government in early autumn. The intention is to repeat the survey annually to monitor any changes over time.

The behavioural tracking survey complements regular communications tracking research which monitors campaign performance.

The overall aims of the behavioural tracking survey are:

- To monitor public behaviour, knowledge and understanding of actions that can help tackle climate change.
- To assess willingness to adopt specific behaviours to help mitigate climate change.
- To track any changes on these measures over the lifetime of the Climate Action Wales campaign.

2. Methodology

The baseline survey was conducted as an ad hoc survey but replicated the [Wales Omnibus](#) method for ease of future tracking. As with the Omnibus, the sample was designed to be representative of the adult population resident in Wales aged 16 and over.

1,000 adults were interviewed online using the Cint™ panel exchange platform. The Cint™ platform and its products comply with various industry standards including ISO 20252 - the international quality standard for market research services. Multiple data quality checks¹ are built into the Cint™ system and Beaufort builds in its own quality control questions and measures within the survey and excludes respondents who fail these checks.

¹ These checks are to ensure that real people are answering the survey questions, to prevent duplicate responses and ensure that sufficient attention is paid to questions to provide high quality data.

The survey was subject to interlocking demographic quota controls² of age within gender. A further separate quota control was set on social grade³ and surveys were undertaken with residents of every local authority in Wales. At the analysis stage, the data was weighted by age group, gender, local authority grouping and social grade. This ensures that the sample reflected 2021 Census figures and was representative of the Wales population aged 16+.

The survey was based on a structured questionnaire (see Appendix 1). It was available in English and Welsh and could be taken in the participants' preferred language. Interviews took an average of 13 minutes to complete.

Fieldwork took place between 26 July and 2 August 2023. A total of 1,000 interviews were completed and analysed. Full data tabulations from the survey have been provided in a separate technical report.

² Quota controls are target numbers of interviews set for specific demographic groups within the population, to help achieve a representative sample for the survey. Interlocking demographic quota controls means that the target incorporates two variables: age group within gender.

³ Social grade is a classification system based on occupation developed for use on the National Readership Survey (NRS). Social grades are defined as follows:

AB: Higher and intermediate managerial, administrative and professional occupations

C1: Supervisory, clerical and junior managerial, administrative and professional occupations

C2: Skilled manual workers

DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only.

3. Research findings

3.1 Current behaviour to help combat climate change

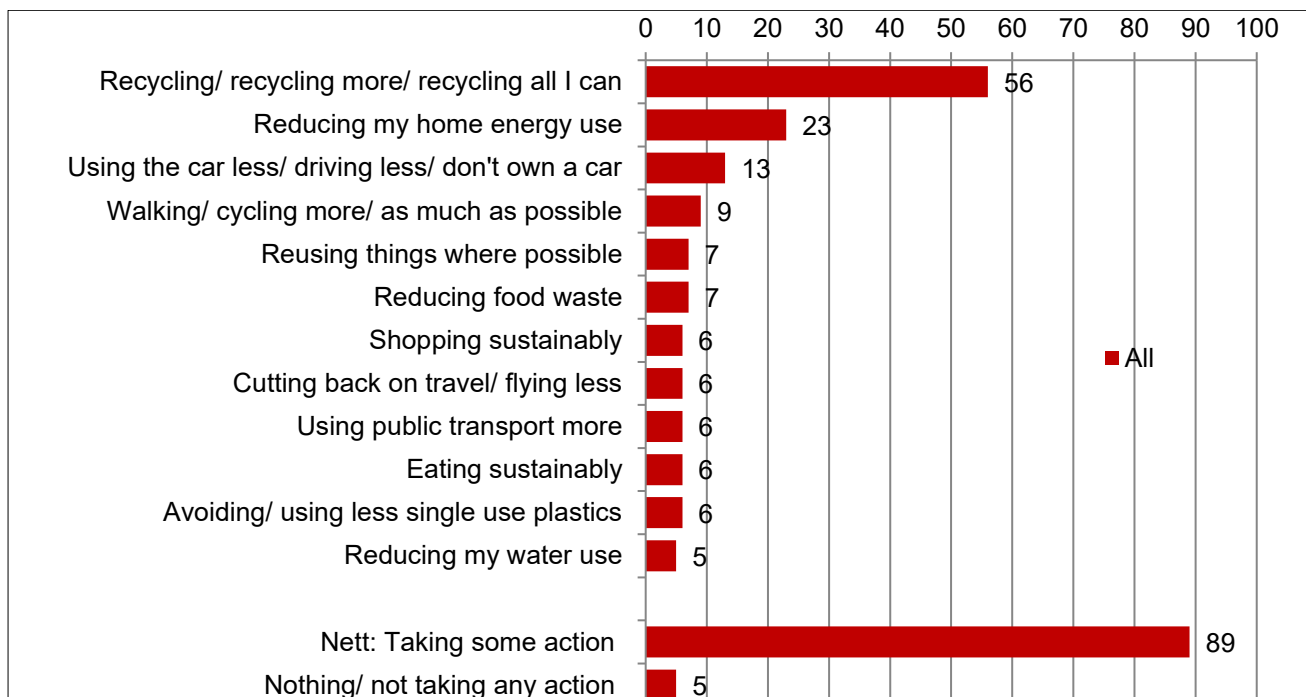
3.1.1 Actions being taken (unprompted)

When asked an open question on, what if anything, they were personally doing to help combat climate change, almost nine in ten of those interviewed (89%) gave examples of actions they were taking. Only 5% said they were not doing anything. Younger people (16-24s) and those in the generally less affluent DE socio-economic groups were least likely to mention taking any action to help combat climate change (at 85% and 86% respectively, compared to 89% overall).

The most mentioned behaviour to help combat climate change was **recycling**. Almost six in ten respondents (56%) said unprompted that they were recycling/ recycling more/ recycling everything they could. The next most common behaviour was **reducing energy use**, with almost one in four respondents (23%) giving examples such as switching off devices when not in use, lowering their central heating temperature and using energy efficient appliances. Just below this, a similar proportion mentioned **green transport choices** - 13% said they were using their car less often/ driving less/ didn't own a car and another 9% that they were walking/ cycling more nowadays. All other behaviours were mentioned spontaneously by smaller proportions of respondents (7% or fewer).

Figure 1 below shows the most common actions being taken.

Figure 1: Main actions* being taken to help combat climate change (unprompted) %



Base: All (1,000)

*Actions mentioned spontaneously by 5% or more of the sample

3.1.2 Prompted behaviours

Respondents were then prompted with a series of different behaviours that might help combat climate change (in randomised order) and asked whether they were taking any steps to do each of these nowadays. For each, they could choose whether:

- They were doing as much as they possibly could (or had already done it, in a few cases where the action was finite, e.g. installing a smart meter)
- They were doing something but could do probably more, or
- They were not doing anything.

After taking out those who said each behaviour did not apply to them, the behaviours with the **highest take-up** overall, all being done now by over eight in ten of those interviewed, were:

- Recycling more (**98% currently doing to some extent**/ 2% not doing at all)
- Reducing their food waste (**95% doing**/ 5% not doing)
- Reducing their home energy and water use (**94% doing**/ 6% not doing)
- Reducing what they buy (**90% doing**/ 10% not doing)
- Reusing things where possible (**89% doing**/ 11% not doing)
- Repairing things instead of buying new (**87% doing**/ 12% not doing)
- Adapting their home to make it more energy efficient (**86% doing**/ 14% not doing).

Among those who said each action applied, marked variations were evident between some behaviours in terms of scope to do more. Reflecting the dominance of recycling in the open question about actions being taken, over three in four (77%) said they were **already doing as much as they possibly could** to recycle more. Similarly, over six in ten (64%) felt they were doing as much as they could to reduce their food waste, while similar proportions said this about installing a smart meter (59%) and reducing their home energy and water use (56%).

While around four in ten respondents to whom it applied felt they were doing as much as they could to reduce what they buy (46%), to reuse things where possible (45%), to repair things instead of buying new (44%), and to adapt their home to make it more energy efficient (40%), similar proportions felt that they **could probably do more** in each of these areas.

Fewer of those who said it applied to them felt they were doing as much as they possibly could to shop and eat sustainably (less than three in ten in each case), but around half recognised there was **scope to do more** for each.

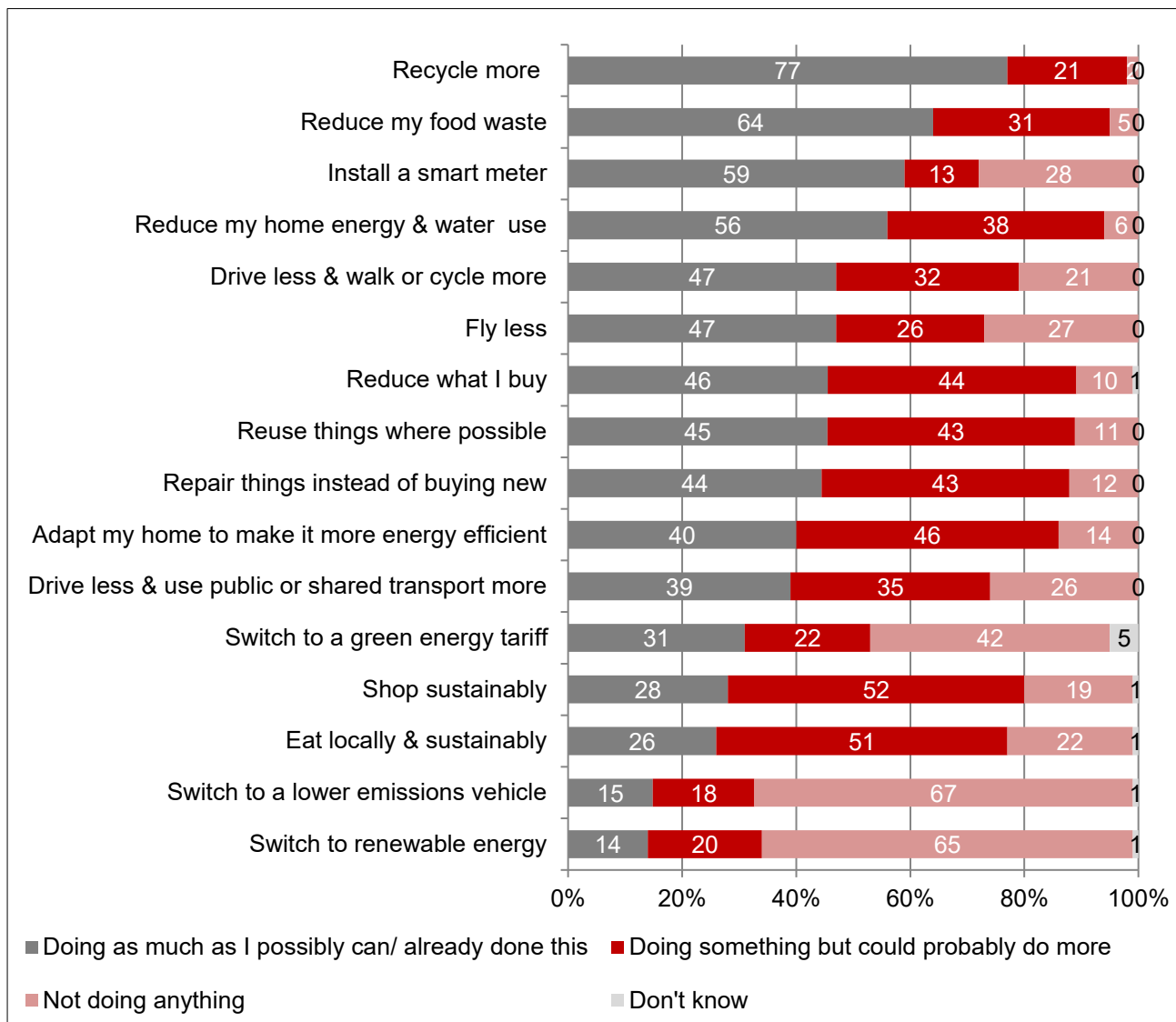
The behaviours with the **lowest current take-up** were:

- Switching to a lower-emissions vehicle (hybrid or electric) (67% of those where it applied not currently doing)
- Switching to renewable energy (65% of those to whom it applied not doing)
- Switching to a green energy tariff (42% to whom it applied not doing)

- Installing a smart meter (28% to whom it applied not doing).

A full breakdown of responses on all behaviours can be found in Figure 2.

Figure 2: Prompted current behaviour to help combat climate change, %



Base: All excluding those answering 'Not applicable to me' (base size for each action ranges between 746 - 995)

3.1.3 Overview of actions and barriers to taking action, by theme

This section summarises the actions already being taken to help combat climate change, as well as the main barriers preventing some people from adopting each behaviour. The behaviours are discussed by theme, namely:

- Green Home Energy Choices
- Green Travel Choices
- Green Purchasing Choices

- Green Food Choices.

Table 1 illustrates how the behaviours are grouped by theme:

Table 1: Behaviours grouped by theme

Theme	Behaviours tested
Green Home Energy Choices	Reduce your home energy and water use
	Adapt your home to make it more energy efficient
	Install a smart meter
	Switch to a green energy tariff
	Switch to renewable energy
Green Travel Choices	Drive less and walk or cycle more
	Drive less and use public or shared transport more
	Fly less
	Switch to a lower emissions vehicle
Green Purchasing Choices	Recycle more
	Reuse things where possible
	Repair things instead of buying new
	Reduce what you buy
	Shop sustainably
Green Food Choices	Reduce your food waste
	Eat locally and sustainably

Where respondents answered **yes** to a specific behaviour, they were asked a follow-up question which listed a range of possible actions related to each behaviour and could select which actions they were currently taking. This report does not go into detail on actions being taken but full results are available in the data tabulations.

Those who answered **no** to each behaviour were shown a list of possible reasons for not doing each and asked what was preventing them from doing so. The main barriers for each theme are discussed in the relevant section below.

Looking at each theme in turn:

Green Home Energy Choices

Table 2 summarises current behaviour regarding **Green Home Energy Choices**. It demonstrates that those to whom each action applied were much more likely to be reducing their home energy and water use, adapting their home to make it more

energy efficient and to have installed a smart meter than to have switched to a green energy tariff or renewable energy.

While the proportions of those saying they were already taking steps to reduce their home energy and water use and adapt their home to make it more energy efficient were high (at 94% and 86% respectively), around four in ten felt they could probably do more about each.

Table 2: Summary of current behaviour for Green Home Energy Choices

Theme	Behaviours tested	% doing each at the moment/ have already done*	% doing something but could probably do more**
Green Home Energy Choices	Reduce your home energy and water use	94	38
	Adapt your home to make it more energy efficient	86	46
	Install a smart meter	71	13
	Switch to a green energy tariff	53	22
	Switch to renewable energy	34	20

Base: All excluding those answering 'Not applicable to me' (base size for each action ranges between 859 - 995)

** Total of those answering 'Yes, I'm doing as much as I possibly can'/'Yes, I've already done this' and 'Yes, I'm doing something but could probably do more'*

*** Biggest opportunities to increase are shaded*

Those who said they were not currently acting on each behaviour were asked what was preventing them from doing so. A list of possible barriers was provided for each Green Home Energy Choice behaviour and respondents could choose all that applied or write in any other barrier/s they chose.

A perception that it would **cost too much/ be too expensive** was the major barrier to making some of the Green Home Energy Choices. Cost was cited by over half (54%) of those not taking any steps at the moment to adapt their home to make it more energy-efficient and by four in ten (40%) of those who had not done anything about switching to renewable energy.

The main reason given by almost half (47%) of those who had not installed or were not doing anything about getting a smart meter fitted was that they were **not convinced it was the right thing to do**.

No one dominant barrier emerged as stopping people from reducing their home energy and water use or switching to a green energy tariff. The main reasons given by those who had not taken any steps to save on home energy were that they felt they were already cutting back as much as they could, and they preferred to have a warm home. Regarding switching to a green energy tariff, barriers were a combination of a lack of information about how to do it, a perception it would be expensive and a lack of saliency (see Table 3).

Table 3: Main barriers to adopting each behaviour for Green Home Energy Choices

Theme	Behaviours	Top 3 barriers	%
Green Home Energy Choices	Reduce your home energy and water use <i>Base: 61*</i>	<ul style="list-style-type: none"> • Already cutting down as much as I can • Prefer to have a warm home • It's hard to do/ too much hassle 	31 30 21
	Adapt your home to make it more energy efficient <i>Base: 142</i>	<ul style="list-style-type: none"> • Costs too much/ expensive to do • It's not up to me/ not my decision • It's inconvenient 	54 29 20
	Install a smart meter <i>Base: 267</i>	<ul style="list-style-type: none"> • Not convinced it's the right thing to do • Need more information about how to do it • It's not up to me/ not my decision 	47 15 15
	Switch to a green energy tariff <i>Base: 389</i>	<ul style="list-style-type: none"> • Need more information about how to do it • Costs too much/ expensive to do • Never really thought about it 	29 27 25
	Switch to renewable energy <i>Base: 559</i>	<ul style="list-style-type: none"> • Costs too much/ expensive to do • Need more information about how to do it • Never really thought about it 	40 27 16

Base: those not currently taking steps to do each (base sizes vary – see above)

**Caution – small base size*

Green Travel Choices

Table 4 summarises current behaviour regarding **Green Travel Choices**.

High proportions of those surveyed who drove or took flights said they were currently taking steps to use the car less and to fly less. Around three in four of those to whom it applied said they were driving less and walking or cycling more (79%), driving less and using public transport more (74%) or flying less (73%). At the same time, around one in three of those already taking some action felt they could probably do more.

In contrast, only a third of those to whom it applied (32%) had already switched or were taking action to switch to a hybrid or electric vehicle.

Table 4: Summary of current behaviour for Green Travel Choices

Theme	Behaviours tested	% doing each at the moment/ have already done*	% doing something but could probably do more**
Green Travel Choices	Drive less and walk or cycle more	79	32
	Drive less and use public or shared transport more	74	35
	Fly less	73	26
	Switch to a lower emissions vehicle	32	18

Base: All excluding those answering 'Not applicable to me' (base size for each action ranges between 746 - 993)

* Total of those answering 'Yes, I'm doing as much as I possibly can'/'Yes, I've already done this' and 'Yes, I'm doing something but could probably do more' ** Biggest opportunities to increase are shaded

Turning to what was preventing some people from taking steps to make Green Travel Choices, the main barrier to switching to a lower emissions vehicle was **cost**. The expense of acquiring a hybrid or electric car was cited as a barrier by almost seven in ten of those who were not currently doing anything in this respect.

Having **journeys that were too far** to make by bicycle or on foot was the dominant reason preventing some people from using their car less and cycling or walking more (mentioned by 58% of this group). Those who were not driving less and using public or shared transport more gave **poor public transport provision** in their area as their main reason for not doing so (mentioned by 50%).

Those not currently taking steps to fly less mentioned they **enjoyed flying** (43%) and that alternatives to flying were **less convenient** (38%).

Table 5: Main barriers to adopting each behaviour for Green Travel Choices

Theme	Behaviours	Top barriers	%
Green Travel Choices	Drive less and walk or cycle more <i>Base: 190</i>	<ul style="list-style-type: none"> • Most of my journeys are too far to walk/ cycle • Don't own a bike • I'm not able to cycle/ walk 	58 33 26
	Drive less and use public or shared transport more <i>Base: 240</i>	<ul style="list-style-type: none"> • Lack of good public transport near me • Enjoy driving and don't want to take public transport instead • It's hard to do/ too much hassle • Costs too much/ expensive to do 	50 30 29 29
	Fly less <i>Base: 212</i>	<ul style="list-style-type: none"> • I enjoy flying • It's less convenient to travel using alternatives • Costs too much/ expensive to do 	43 38 14
	Switch to a lower emissions vehicle <i>Base: 537</i>	<ul style="list-style-type: none"> • Costs too much/ expensive to do • Worried there are not enough charging points across Wales • Don't want an electric vehicle 	68 36 28

Base: those not currently taking steps to do each (base sizes vary – see above)

Green Purchasing Choices

Table 6 summarises current behaviour regarding **Green Purchasing Choices**.

Claimed adoption of all the Green Purchasing Choices behaviours was high among those to whom each behaviour applied. Almost all (97%) said they were recycling. Around nine in ten said they were reducing what they buy (e.g. only buying things they needed, buying better quality items that lasted longer and borrowing or renting items) (90%), reusing things where possible (e.g. buying second hand rather than new, selling or donating things rather than throwing them away) (89%) and repairing things instead of buying new (87%). Finally, eight in ten (80%) said they were taking steps to shop sustainably.

For all these behaviours (except recycling), however, a high proportion of those already doing each felt they could do more. This was especially marked for shopping sustainably – although the majority of those interviewed said they were doing this to some extent (80%), over half (52%) felt there was room to do more.

Table 6: Summary of current behaviour for Green Purchasing Choices

Theme	Behaviours tested	% doing each at the moment/ have already done*	% doing something but could probably do more**
Green Purchasing Choices	Recycle more	98	21
	Reduce what you buy	90	44
	Reuse things where possible	89	43
	Repair things instead of buying new	87	43
	Shop sustainably	80	52

Base: All excluding those answering 'Not applicable to me' (base size for each action ranges between 986 - 993)

* Total of those answering 'Yes, I'm doing as much as I possibly can'/'Yes, I've already done this' and 'Yes, I'm doing something but could probably do more'

** Biggest opportunities to increase are shaded

The main barriers to making Green Purchasing Choices are outlined in Table 7 and varied according to the behaviour:

- **Cost** was the primary deterrent to shopping sustainably, mentioned by 47% of those who were not currently taking steps to do this.
- **Not having the right equipment or skills** was the main barrier to repairing things instead of buying new, cited by 47% of those not doing this at the moment.
- **Preferring to have their own things rather than borrowing items** was the principal reason given by those who were not taking steps to reduce what they buy (mentioned by 40% of this group).
- **Never having thought about it** and **disliking second-hand goods** were the main factors preventing some people from reusing things wherever possible rather than buying new (at 35% and 34% of this group respectively).
- **Poor local recycling services/ options** were cited by 31% of the very small proportion not currently taking steps to recycle more.

Table 7: Main barriers to adopting each behaviour for Green Purchasing Choices

Theme	Behaviours	Top 3 barriers	%
Green Purchasing Choices	Recycle more <i>Base: 20*</i>	<ul style="list-style-type: none"> Recycling collections/ options are not good where I live Never really thought about it It's hard to do/ too much hassle 	31 24 24
	Reuse things where possible <i>Base: 108</i>	<ul style="list-style-type: none"> Never really thought about it Don't like the thought of second-hand It's hard to do/ too much hassle 	35 34 13
	Repair things instead of buying new <i>Base: 127</i>	<ul style="list-style-type: none"> Don't have right equipment/ skills It's hard to do/ too much hassle Don't have time to do it 	47 32 24
	Reduce what you buy <i>Base: 101</i>	<ul style="list-style-type: none"> Prefer to have my own things rather than borrow items Enjoy shopping for new items Never really thought about it 	40 26 17
	Shop sustainably <i>Base: 191</i>	<ul style="list-style-type: none"> Costs too much/ too expensive to do Need more information about how to do it Never really thought about it 	47 33 20

Base: those not currently taking steps to do each (base sizes vary – see above)

*Caution – very small base size

Green Food Choices

Lastly, Table 8 summarises current behaviour regarding **Green Food Choices**.

Almost all those to whom it applied (95%) said they were taking action to reduce their food waste, while around three in four (77%) were attempting to eat locally and sustainably. A high proportion of the latter felt they could take more action in this respect, however (51% of this group overall).

Table 8: Summary of current behaviour for Green Food Choices

Theme	Behaviours tested	% doing each at the moment/ have already done*	% doing something but could probably do more**
Green Food Choices	Reduce your food waste	95	31
	Eat locally and sustainably	77	51

Base: All excluding those answering 'Not applicable to me' (base size for each action ranges between 971 - 987)

* Total of those answering 'Yes, I'm doing as much as I possibly can'/'Yes, I've already done this' and 'Yes, I'm doing something but could probably do more'** Biggest opportunities to increase are shaded

Turning to the barriers to Green Food Choices, a perception that it **costs too much/ is too expensive** was the main reason preventing some people from taking steps to eat locally and sustainably (mentioned by 56% of this group). In the case of reducing food waste (which the great majority of those interviewed were already doing), the principal barriers were **not liking the thought of eating leftovers** and **a lack of saliency**, having never really thought about it (mentioned by 27% and 22% of this group respectively) (see Table 9).

Table 9: Main barriers to adopting each behaviour for Green Food Choices

Theme	Behaviours	Top 3 barriers	%
Green Food Choices	Reduce your food waste Base: 53*	<ul style="list-style-type: none"> Don't like the thought of eating leftovers Never really thought about it Need more information about how to do it 	27 22 18
	Eat locally and sustainably Base: 218	<ul style="list-style-type: none"> Costs too much/ expensive to do Need more information about how to do it It's hard to do/ too much hassle 	56 17 17

Base: those not currently taking steps to do each (base sizes vary – see above)

*Caution – small base size

3.2 Knowledge of the actions individuals can take to help combat climate change

When asked generally how much they felt they knew about the individual actions people in Wales can take to help combat climate change, over half those interviewed (55%) felt their knowledge was limited - 44% said they knew 'a little' while 10% felt they knew 'nothing'.

Those in the less affluent DE socioeconomic groups and women were most likely to feel they knew only a limited amount or nothing about what actions they could take. 63% of DEs interviewed said this, as did 61% of women, compared to 52% of ABC1s and 47% of men.

In contrast, only one in ten of those interviewed (10%) felt they knew 'a great deal' about what actions people could take to combat climate change, while around one in three (34%) felt they knew 'a fair amount'.

Respondents were then prompted with the behaviours to help combat climate change discussed above and were asked how much or how little they felt they knew about how to do each.

The behaviours about which respondents **felt most knowledgeable** (where at least three in four of those interviewed felt they knew 'a great deal' or 'a fair amount') were:

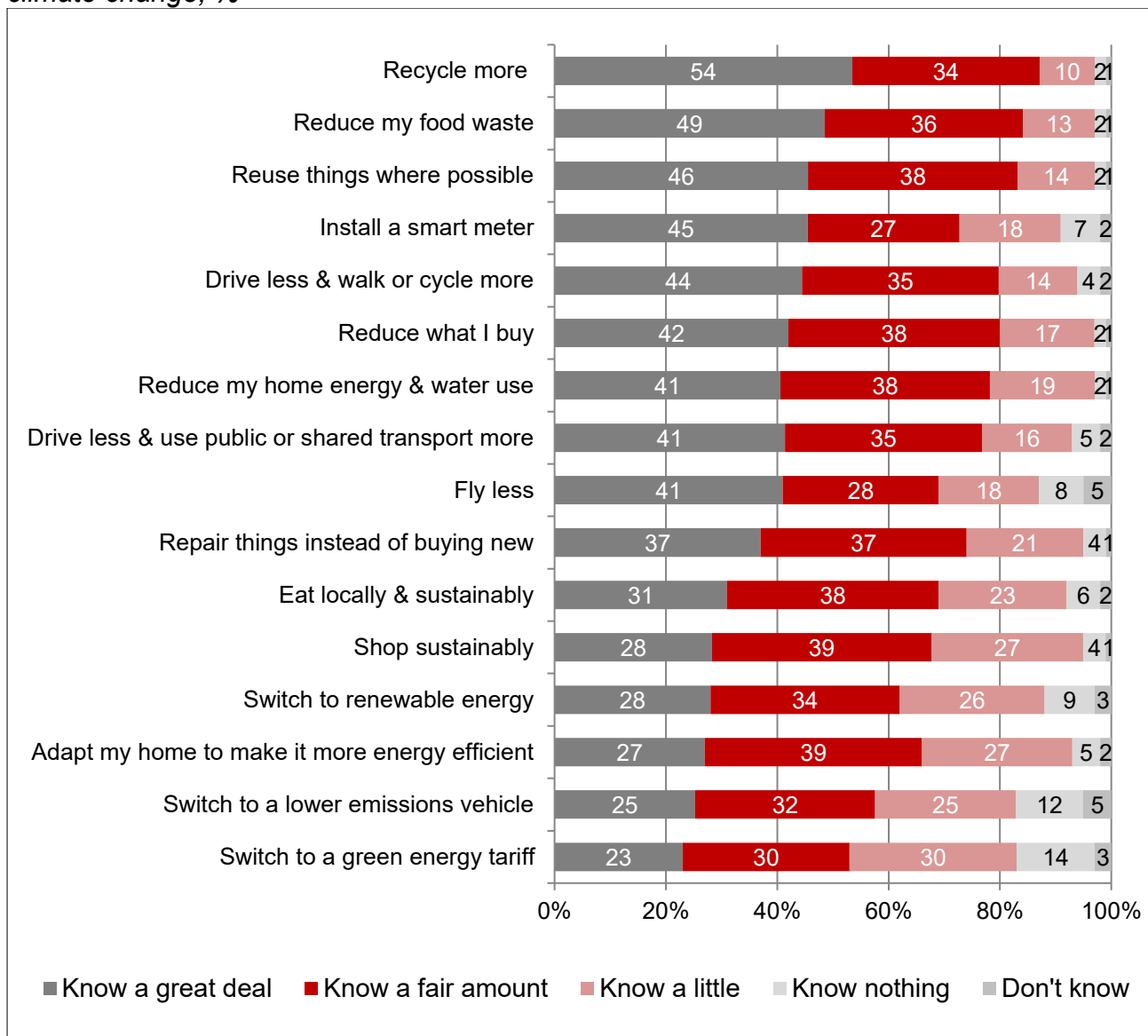
- Recycling more (**88% knowledgeable**/ 11% not knowledgeable)
- Reducing their food waste (**85% knowledgeable**/ 14% not knowledgeable)
- Reusing things where possible (**83% knowledgeable**/ 15% not knowledgeable)
- Reducing what they buy (**81% knowledgeable**/ 19% not knowledgeable)
- Driving less and walking or cycling more (**79% knowledgeable**/ 19% not knowledgeable)
- Reducing their home energy and water use (**78% knowledgeable**/ 21% not knowledgeable)
- Driving less and using public transport more (**76% knowledgeable**/ 22% not knowledgeable).

Conversely, those with the **lowest levels of familiarity**, where the percentage of respondents saying they knew 'nothing' or just 'a little' about how to do each were highest, were:

- Switching to a green energy tariff (54% knowledgeable/ **43% not knowledgeable**)
- Switching to a lower emissions vehicle (57% knowledgeable/ **38% not knowledgeable**)
- Switching to renewable energy (62% knowledgeable/ **35% not knowledgeable**)
- Adapting your home to make it more energy efficient (66% knowledgeable/ **32% not knowledgeable**)
- Shopping sustainably (67% knowledgeable/ **31% not knowledgeable**).

Levels of knowledge for each of the sixteen behaviours is summarised in Figure 3.

Figure 3: How much people know about how to do different behaviours to combat climate change, %



Base: All (1,000)

3.3 Willingness to take specific actions to help tackle climate change (short term and longer term)

Survey respondents were questioned about their willingness to take specific actions to help tackle climate change or to do them more often (if already doing) in both the short term (that is, in the next year) and in the longer term (that is, in the next five years).

Willingness to act **in the short-term** was generally high. Looking at those who said each action was applicable to them, the great majority of around eight to nine in ten

were willing (that is, answered 'yes, definitely' or 'yes, probably') to do each of the following or do them more often in the next year:

- Reduce their food waste (92% willing overall)
- Recycle more (90% willing)
- Reduce their home energy and water use (87% willing)
- Reduce what they buy (86% willing)
- Reuse things where possible (86% willing)
- Repair things instead of buying new (84% willing)
- Shop sustainably (77% willing)
- Adapt their home to make it more energy efficient (77% willing).

Slightly lower proportions (but still the majority) were willing to:

- Eat locally and sustainably (74% willing)
- Drive less and walk or cycle more (73% willing)
- Drive less and using public transport more (66% willing)
- Fly less (64% willing)
- Install a smart meter (63% willing)
- Switch to a green energy tariff (57% willing).

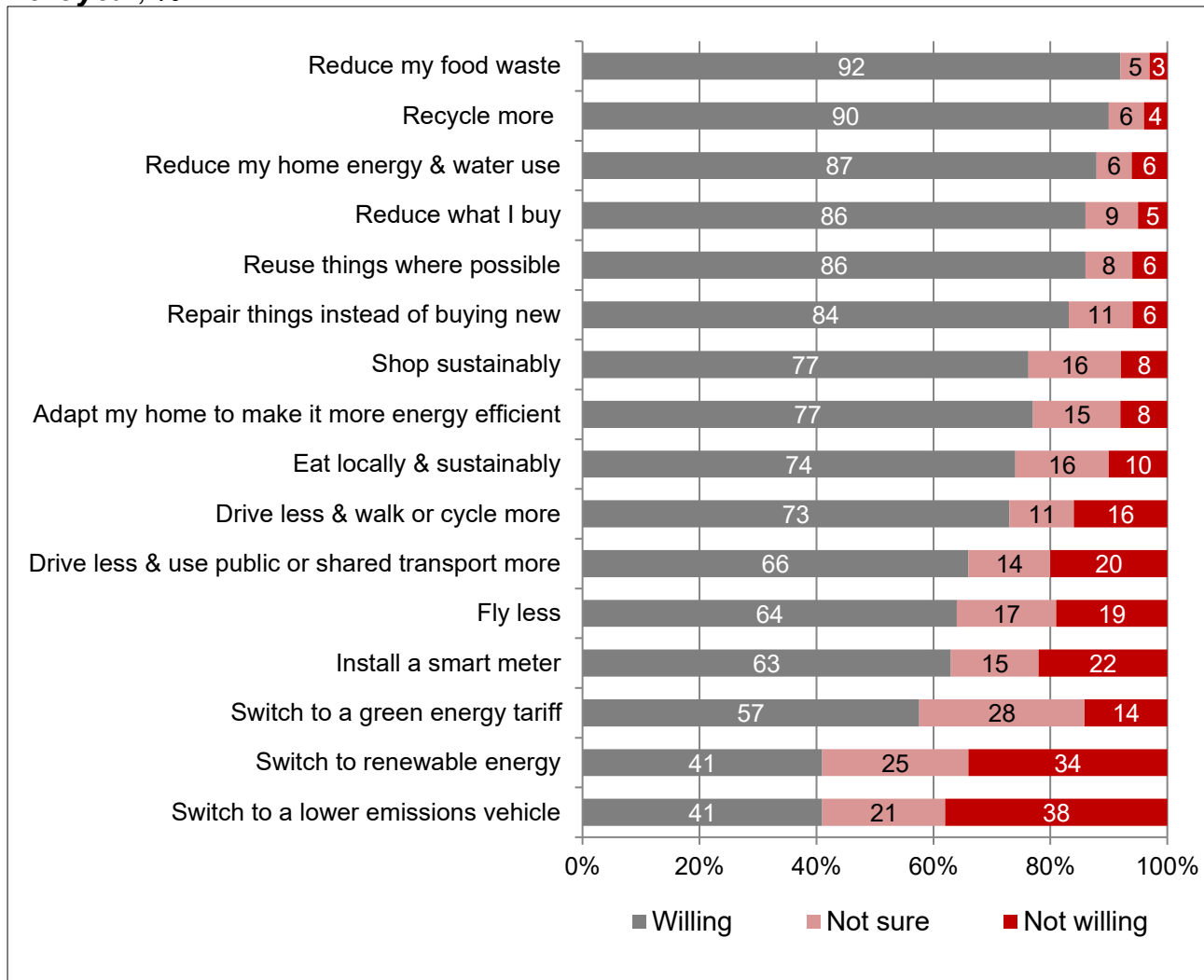
On the other hand, fewer than half (41%) were willing to consider switching to renewable energy or switching to a lower emissions vehicle in the next year. In fact, almost as many answered they would definitely or probably **not be willing** to do these in the short-term (38% in the case of switching to a hybrid or electric vehicle and 34% for switching to renewable energy).

Other behaviours for which some resistance to adopt in the short-term was evident were:

- Installing a smart meter (22% unwilling)
- Driving less and using public or shared transport more (20% unwilling)
- Flying less (19% unwilling)
- Driving less and walking or cycling more (16% unwilling)

Moreover, sizeable proportions of those interviewed were uncertain about whether they would switch to a green energy tariff (28% not sure) or switch to renewable energy (25% not sure) (see Figure 4).

Figure 4: Willingness to take specific actions to help tackle climate change in the next year, %



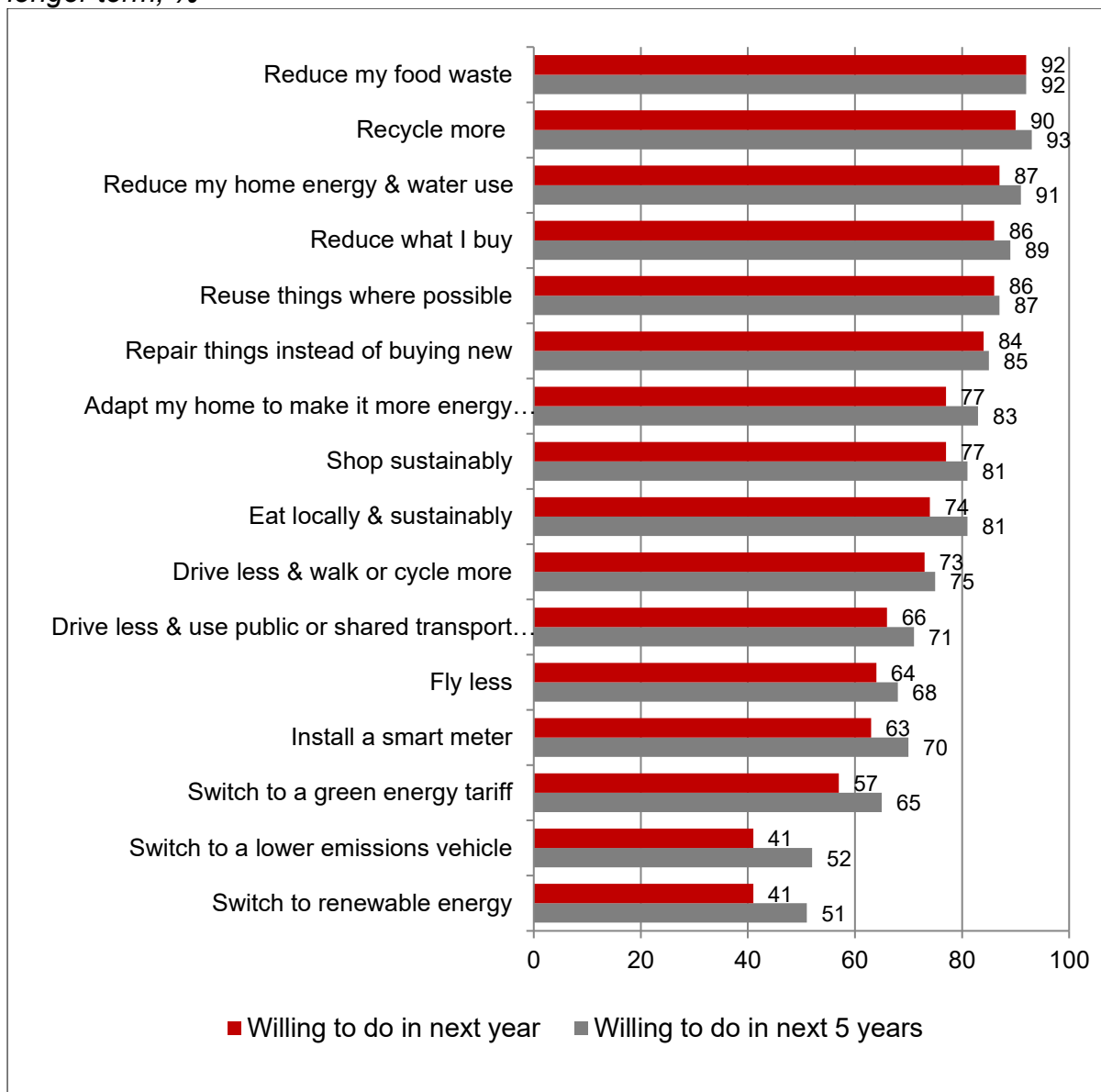
Base: All excluding those answering 'Not applicable to me' (base size for each action ranges between 757 - 989)

Note: Willing = those answering Yes, definitely/ Yes, possibly; Not willing = those answering No, definitely not/ No, probably not

Willingness to consider adopting each behaviour **in the longer term**, that is in the next five years, was generally higher than in the short-term (see Figure 5). The only exception to this was in the case of reducing food waste, which was very high to start with.

The largest increases were evident for the actions where short-term willingness to act was lowest (that is, switching to a lower emissions vehicle or switching to renewable energy). While the proportion willing to do each rose by around 10% when looking at an extended time period, willingness to take action remained relatively low for these behaviours - 52% were willing to switch to a hybrid or electric car and 51% were willing to switch to renewable energy in the next five years.

Figure 5: Willingness to take specific actions in the short-term compared to the longer term, %



Base: All excluding those answering 'Not applicable to me' (base size for each action ranges between 757 - 989)

Note: Willing = those answering Yes, definitely/ Yes, possibly

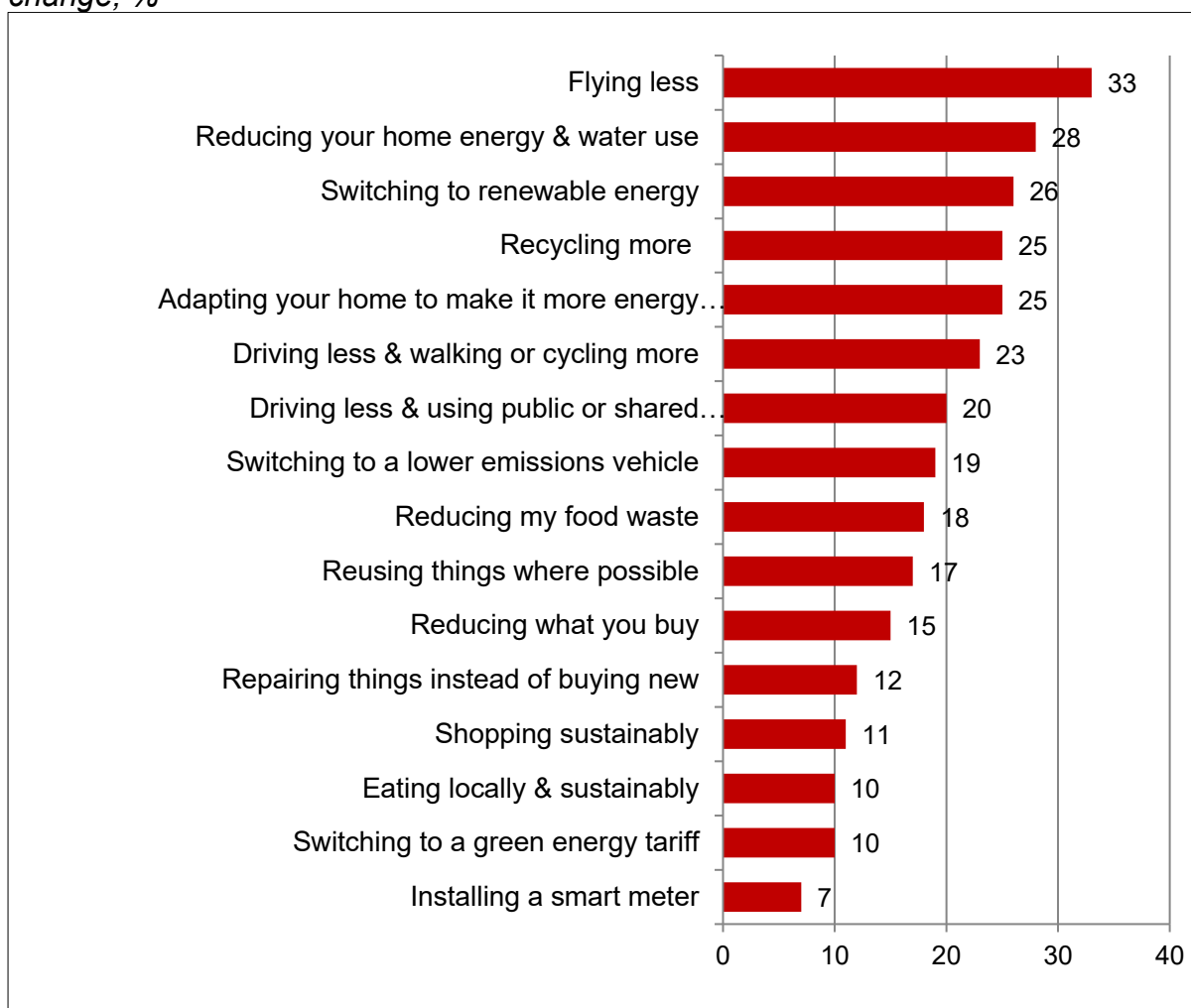
3.4 Understanding of which actions will have the biggest impact on tackling climate change

Finally, survey respondents were prompted with the list of behaviours and were asked to choose the three actions that they thought would have the biggest impact on tackling climate change. Results are shown in Figure 6.

The action perceived to have the biggest impact on tackling climate change and chosen by the largest proportion of respondents was **flying less**, selected by one in three (33%) of those interviewed. Almost three in ten (28%) selected reducing your home energy and water usage, while around one in four chose switching to renewable energy, recycling more, adapting your home to make it more energy efficient and driving less and walking or cycling more.

Actions that were felt to be less important in tackling climate change (all selected by around one in ten or fewer of those surveyed) were installing a smart meter, switching to a green energy tariff, eating locally and sustainably and shopping sustainably.

Figure 6: Perceptions of which actions will have biggest impact on tackling climate change, %



Base: All (1,000)

4. Summary and conclusions

The survey suggests that the great majority of people in Wales are already personally taking some action to help combat climate change. Only one in twenty of those interviewed stated they were not doing anything. Recycling dominated the spontaneous mentions of actions being taken by respondents, followed at a lower level by reducing home energy use and driving less/ walking and cycling more.

So there appears to be recognition of the importance of the issue and a general willingness to act, at least in certain respects. Despite this, a high proportion of those surveyed were not confident they knew what individual actions they could take to help combat climate change. Over half those interviewed felt their knowledge was limited or non-existent, suggesting that more education and engagement will be important to encourage behaviour change.

Those slightly less likely to be personally taking action to combat climate change were young people (16-24s) and the least affluent (DEs). The latter group were also most likely to feel they knew only a little or nothing about what actions individuals can take to help. These groups could be targeted through future campaign activity/ messaging to seek to increase their knowledge of what to do and therefore push up the proportion acting.

When prompted, there was high claimed take up of most of the Green behaviours. For some behaviours such as recycling and reducing food waste there appears to be limited scope to increase further, as people felt they were already doing as much as they possibly could about each.

That said, there is still room for improvement on some behaviours. The survey findings suggest there are other behaviours where, despite adoption being high, a sizeable proportion of people taking action acknowledge there is scope to do more, in particular:

- Green Purchasing Choices - shopping sustainably, reducing what they buy, reusing things where possible, repairing things instead of buying new.
- Green Home Energy Choices – adapting their home to make it more energy efficient and, to a lesser extent, reducing their home energy and water use.
- Green Food Choices – eating sustainably.

Furthermore, there are certain behaviours where adoption is currently much lower. Only around a third of the public to whom each is relevant have or are taking steps to switch to a lower emissions vehicle or switch to renewable energy, while around six to seven in ten of those applicable are doing the same for switching to a green energy tariff or installing a smart meter.

But while these behaviours represent opportunities, some will be more difficult to influence than others, because of the barriers to changing behaviour and because willingness to adopt them is lower. Cost/ expense is the dominant barrier to switching to a hybrid or electric vehicle and to switching to renewable energy. Behaviour on these dimensions is therefore likely to be difficult to shift, evidenced by the relatively

low willingness displayed in the survey to take action on these, even in an extended time period of the next five years.

While cost was also one of the main perceived barriers to switching to a green energy tariff, other barriers to adopting this behaviour may be easier to tackle through communications activity, for example, the requirement for more information about how to do it and a lack of saliency (having never really thought about it). Reinforcing the importance of information, switching to a green energy tariff was the behaviour with the highest proportion of respondents saying they knew nothing or just a little about how to do it. Other behaviours where the survey indicates the public would benefit from more education/ information were switching to a lower emissions vehicle, switching to renewable energy, adapting their home to make it more energy efficient and shopping sustainably. A sizeable proportion of around three to four in ten admitted to not feeling very knowledgeable about how to do each.

Likewise, the primary barrier to installing a smart meter was not being convinced it was the right thing to do. Again, any misconceptions or misinformation about smart meters could be addressed through messaging.

Turning to the public's understanding of which actions will have the biggest impact on climate change, flying less was the most-commonly selected behaviour. Even so, around one in five of those interviewed said they were not willing to change their behaviour and start flying less, even in the extended period of the next five years.

Most of the other actions felt to be likely to have the biggest impact were linked to Green Energy Choices, for example, reducing home energy and water use, switching to renewable energy and adapting their home to make it more energy efficient. But certain other Green Energy Choices such as installing a smart meter and switching to a green energy tariff were not perceived likely to have a major impact and were selected by much smaller proportions of those surveyed. These misconceptions could be addressed through the campaign.

Apart from the action of recycling more, most Green Purchasing Choices behaviours came lower down the list, suggesting that the environmental impact of shopping sustainably, reducing what you buy, repairing things instead of buying new, etc. is not understood. Messaging around the importance of making Green Purchasing Choices to help combat climate change could assist with improving the public's understanding in this area.

Appendix 1 – Research Questionnaire

Climate Action Wales Behavioural Tracking Survey questions FINAL

Q1a. What, if anything, are you personally doing to help combat climate change?

Write in

Q1b. How much do you feel you know about the individual actions people in Wales can take to help combat climate change? Scale to be inverted between interviews

A great deal
A fair amount
A little
Nothing

Don't know

Q2. Are you taking any steps at the moment to....?

[Yes, I'm doing as much as I possibly can (*change to I've already done this – for last 4 behaviours*)/ Yes, I'm doing something but could probably do more/ No, I'm not doing anything/ Not applicable to me/ Don't know]

ASK FOR ALL BEHAVIOURS [*Randomise order of behaviours*]

- a) reduce your home energy and water use
- b) drive less and walk or cycle more
- c) recycle more
- d) reuse things where possible (e.g. buying second hand rather than new, selling or donating things rather than throwing them away)
- e) reduce your food waste (e.g. reheating leftovers, only buying the food you know you're going to use, using up fresh produce before it goes off, storing food correctly to help it last longer)
- f) drive less and use public or shared transport more
- g) repair things instead of buying new
- h) reduce what you buy (e.g. only buying things you need, buying better quality items that last longer, borrowing or renting items)
- i) shop sustainably (e.g. shopping locally, buying from local producers, buying items with less packaging, buying refills or using refill shops)
- j) eat locally and sustainably (e.g. eating seasonal food, eating food that is locally produced, buying food that has low carbon impacts)
- k) fly less
- l) adapt your home to make it more energy efficient (e.g. draught proofing, buying energy efficient/ LED light bulbs, loft, floor or wall insulation, insulating hot water pipes, fitting double or triple glazing)
- m) install a smart meter

- n) switch to a green energy tariff
- o) switch to renewable energy (e.g. solar panels, heat pumps)
- p) switch to a lower emissions vehicle (e.g. hybrid or electric)

Q3i. Now, thinking about specific actions that people can take to help tackle climate change. Are you willing to do the following or do them more often in the next year? [Randomise order of behaviours]

[No, definitely not / No, probably not / Not sure / Yes, probably / Yes, definitely/ Not applicable to me] [*Invert scale between participants*]

- a) reduce your home energy and water use
- b) drive less and walk or cycle more
- c) recycle more
- d) reuse things where possible (e.g. buying second hand rather than new, selling or donating things rather than throwing them away)
- e) reduce your food waste (e.g. reheating leftovers, only buying the food you know you're going to use, using up fresh produce before it goes off, storing food correctly to help it last longer)
- f) drive less and use public or shared transport more
- g) repair things instead of buying new
- h) reduce what you buy (e.g. only buying things you need, buying better quality items that last longer, borrowing or renting items)
- i) shop sustainably (e.g. shopping locally, buying from local producers, buying items with less packaging, buying refills or using refill shops)
- j) eat locally and sustainably (e.g. eating seasonal food, eating food that is locally produced, buying food that has low carbon impacts)
- k) fly less
- l) adapt your home to make it more energy efficient (e.g. draught proofing, buying energy efficient/ LED light bulbs, loft, floor or wall insulation, insulating hot water pipes, fitting double or triple glazing)

ASK ALL EXCEPT THOSE ANSWERING 'YES, DEFINITELY' FOR EACH BEHAVIOUR ABOVE

Q3ii. Are you willing to do each of these or do them more often in the next five years? [Randomise order of behaviours but b) and f) to always be asked together]

[No, definitely not / No, probably not / Not sure / Yes, probably / Yes, definitely]
[*Invert scale between participants*]

- a) reduce your home energy and water use
- b) drive less and walk or cycle more
- c) recycle more
- d) reuse things where possible (e.g. buying second hand rather than new, selling or donating things rather than throwing them away)
- e) reduce your food waste (e.g. reheating leftovers, only buying the food you know you're going to use, using up fresh produce before it goes off, storing food

- correctly to help it last longer)
- f) drive less and use public or shared transport more
- g) repair things instead of buying new
- h) reduce what you buy (e.g. only buying things you need, buying better quality items that last longer, borrowing or renting items)
- i) shop sustainably (e.g. shopping locally, buying from local producers, buying items with less packaging, buying refills or using refill shops)
- j) eat locally and sustainably (e.g. eating seasonal food, eating food that is locally produced, buying food that has low carbon impacts)
- k) fly less
- l) adapt your home to make it more energy efficient (e.g. draught proofing, buying energy efficient/ LED light bulbs, loft, floor or wall insulation, insulating hot water pipes, fitting double or triple glazing)

Q4i. Here are a few more specific actions that people can take to help tackle climate change. Are you willing to do the following in the next year?
[Randomise order of behaviours]

[No, definitely not / No, probably not / Not sure / Yes, probably / Yes, definitely/ Not applicable to me] *[Invert scale between participants]*

- a) install a smart meter
- b) switch to a green energy tariff
- c) switch to renewable energy (e.g. solar panels, heat pumps)
- d) switch to a lower emissions vehicle (e.g. hybrid or electric)

ASK ALL EXCEPT THOSE ANSWERING ‘YES, DEFINITELY’ FOR EACH BEHAVIOUR ABOVE

Q4ii. Are you willing to do each of these in the next five years? *[Randomise order of behaviours]*

[No, definitely not / No, probably not / Not sure / Yes, probably / Yes, definitely]
[Invert scale between participants]

- a) install a smart meter
- b) switch to a green energy tariff
- c) switch to renewable energy (e.g. solar panels, heat pumps)
- d) switch to a lower emissions vehicle (e.g. hybrid or electric)

Q5. How much do you feel you know about how to do each of the following things. Firstly, how to [behaviour 1]...?

[A great deal/ a fair amount/ a little/ nothing/ don't know]

ASK FOR ALL BEHAVIOURS:

- a) reduce your home energy and water use
- b) drive less and walk or cycle more
- c) recycle more

- d) reuse things where possible
- e) reduce your food waste
- f) drive less and use public or shared transport more
- g) repair things instead of buying new
- h) reduce what you buy
- i) shop sustainably
- j) eat locally and sustainably
- k) fly less
- l) adapt your home to make it more energy efficient
- m) install a smart meter
- n) switch to a green energy tariff
- o) switch to renewable energy
- p) switch to a lower emissions vehicle (e.g. hybrid or electric)

FOR EACH WHERE RESPONSE IS YES AT Q2, ASK FOLLOW-ON QUESTION

[Multi response answers]

Q6a. What are you currently doing to reduce your home energy and water use?

- Checking my home energy rating
- Lowering the thermostat/ settings on radiators in colder months (i.e the temperature to which the house is heated)
- Using the heating less often in colder months or delaying the time of the year you turn it on
- Wearing warmer clothing in colder months
- Reducing the boiler flow temperature
- Turning down the hot water temperature on my combi boiler
- Drying clothes outside/ on a clothes airer rather than use the tumble dryer
- Ventilating or shading my home in warmer weather (e.g. closing curtains and blinds to block direct sunlight, opening windows at night to let cooler air in)
- Opening curtains to allow sunlight to warm the house
- Finding out what grants and support I can get for my home
- Bleeding the radiators regularly
- Keeping radiators clear to allow heat to spread more quickly (e.g. by not drying clothes on radiators or covering them)
- Turning off lights when not in the room
- Unplugging appliances when not in use
- Taking a shower not a bath
- Reducing the time I spend in the shower
- Only using the washing machine when I have a full load
- Washing at lower temperatures e.g. 30 degrees
- I don't know
- Other (write in) _____

Q6b. What are you currently doing to drive less and walk or cycle more?

Walking/ wheelchairing or cycling to school with my children
Walking/ wheelchairing or cycling to work
Walking/ wheelchairing or cycling to the shops
Having a car/van/motorcycle-free day at least once a week
Have bought a bike

I don't know

Other (write in) _____

Q6c. What are you currently doing to recycle more?

Recycling all recyclable items at home correctly (e.g. bottles, plastics, cardboard)
Taking recyclable items that can't be recycled at home to Council recycling centres/
supermarkets (e.g. plastic bags/ wrapping, clothing/ textiles, furniture, electrical items)
Checking on what can and can't be recycled
Putting all food waste into my food waste recycling bin (caddy)

I don't know

Other (write in) _____

Q6d. What are you currently doing to reuse things where possible?

Buying second hand or used items rather than new (e.g. from eBay, Vinted,
Facebook Marketplace, car boot sales and charity shops)
Donating or selling unwanted items (e.g. through eBay, Vinted, Facebook
Marketplace, car boot sales and charity shops)
Repurposing things for a different use instead of throwing them away
Upcycling or doing up furniture or clothes
Using re-usable products (e.g. coffee cups, shopping bags, water bottles, reusable
straws)

I don't know

Other (write in) _____

Q6e. What are you currently doing to reduce your food waste?

Reheating leftovers or using them in a different meal rather than throwing them away
Only buying the food I know I'm going to use, e.g. by planning meals more carefully
Checking what's in the fridge or freezer before I go shopping
Using up fresh produce before it goes off
Cooking in bulk and freezing meals for when needed
Checking the 'best by' and 'use by' dates on food when shopping
Checking the food I buy is stored correctly to help it last longer
Composting food waste at home

I don't know

Other (write in) _____

Q6f. What are you currently doing to drive less and use public or shared transport more?

Having a car/van/motorcycle-free day at least once a week
 Getting the bus or train to work or to school/ college/ university
 Getting the bus or train when going shopping
 Getting the bus or train for leisure trips/ a day out/ a night out
 Car sharing (e.g. with work colleagues or on the school run)
 Have joined a car club

I don't know

Other (write in) _____

Q6g. What are you currently doing to repair things instead of buying new?

Learning how to sew
 Buying or have bought a sewing machine
 Finding or have found my nearest repair centre
 Learning how to repair broken items
 Repairing or fixing broken items (e.g. by myself, a professional or at a repair café)
 Upcycling or doing up furniture or clothes

I don't know

Other (write in) _____

Q6h. What are you currently doing to reduce what you buy?

Only buying what I need
 Buying fewer things
 Buying reliable brands that provide customer support/ repairs after purchase
 Buying better quality items that will last longer
 Not buying new things for the sake of it
 Using items I already have
 Borrowing or renting items (e.g. library books, tools, toys, etc.)
 Upcycling or doing up furniture or clothes
 Using re-usable products (e.g. coffee cups, shopping bags, water bottles, reusable straws)

I don't know

Other (write in) _____

Q6i. What are you currently doing to shop sustainably?

Shopping locally
 Buying from local producers
 Choosing to buy from sustainable businesses

Buying items with less packaging
 Buying refills where I can
 Using refill shops

I don't know
 Other (write in) _____

Q6j. What are you currently doing to eat locally and sustainably?

Eating seasonal food
 Eating food that is locally produced
 Finding out about sustainable food
 Buying food that has low carbon impacts

I don't know
 Other (write in) _____

Q6k. What are you currently doing to fly less?

Researching alternatives to flying when travelling abroad
 Using alternatives to flying when travelling abroad
 Reducing the number of times I fly each year
 Reducing the number of long haul flights I take each year (e.g. to USA, India, Africa, Australia)
 Taking holidays in Wales
 Taking holidays in the UK

I don't know
 Other (write in) _____

Q6l. What are you currently doing to adapt your home to make it more energy efficient?

Fitting or have fitted draught proofing
 Buying or using energy efficient/ LED light bulbs
 Fitting or have fitted loft, floor or wall insulation
 Insulating or have insulated the hot water pipes in the house
 Fitting or have fitted double or triple glazing
 Installing or have installed a water efficient shower head
 Regularly servicing and maintaining my central heating system/ bleeding my radiators
 Fitting or have fitted timer lights on switches
 Using smart heating and/ or smart lighting (controlled by an app)
 Using motion sensors on lights
 Fitting or have fitted solar or heat window films

I don't know
 Other (write in) _____

Q6m. What are you currently doing to install a smart meter?

Researching how to get a smart meter installed at home
Have contacted my energy supplier/s
Waiting on my supplier to install a smart meter

I don't know
Other (write in) _____

Q6n. What are you currently doing to switch to a green energy tariff?

Researching green energy tariff options generally
Researching green energy tariff options available for my home
Switching to another supplier providing a green energy tariff
Switching to a green energy tariff with my current supplier
Waiting on my supplier to change tariff

I don't know
Other (write in) _____

Q6o. What are you currently doing to switch to renewable energy?

Researching options available for my home
Researching any grants available
Fitting or have fitted solar panels
Fitting or have fitted a heat pump

I don't know
Other (write in) _____

Q6p. What are you currently doing to switch to a lower emissions vehicle (e.g. hybrid or electric)?

Researching hybrid or electric vehicles
Test driving hybrid or electric vehicles
Researching any grants available for purchasing a hybrid or electric vehicle
Waiting to hear back from a supplier on next steps
In the process of purchasing a hybrid or electric vehicle
Waiting for a charging point to be installed at home

I don't know
Other (write in) _____

FOR EACH WHERE RESPONSE IS NO AT Q2, ASK FOLLOW-ON QUESTION*[Multi response answers]***Q7a. What is preventing you from reducing your home energy and water use?**

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision
I'm already cutting down as much as I can
I prefer to have a warm home
I prefer a bath to a shower

I don't know
Other (write in)

Q7b. What is preventing you from driving less and walking or cycling more?

Never really thought about it
I need more information about walking and cycling routes in my area
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision
There's a lack of good walking and cycling routes in my area
Most of my journeys are too far to walk or cycle
I don't own a bike
I enjoy driving and don't want to walk or cycle instead
I don't feel safe walking and cycling
I'm not confident cycling or walking
I'm not able to cycle or walk

I don't know
Other (write in)

Q7c. What is preventing you from recycling more?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision

Recycling collection/ options are not good where I live

I don't know

Other (write in)

Q7d. What is preventing you from reusing things where possible?

Never really thought about it

I need more information about how to do it

It's hard to do/ too much hassle

Don't have time to do it

Costs too much/ it's expensive to do

I'm not convinced it's the right thing to do

It's not up to me/ not my decision

I don't like the thought of second hand

I don't know

Other (write in)

Q7e. What is preventing you from reducing your food waste?

Never really thought about it

I need more information about how to do it

It's hard to do/ too much hassle

Don't have time to do it

Costs too much/ it's expensive to do

I'm not convinced it's the right thing to do

It's not up to me/ not my decision

I don't like the thought of eating leftovers

I don't know

Other (write in)

Q7f. What is preventing you from driving less and using public or shared transport more?

Never really thought about it

I need more information about public transport routes and options in my area

It's hard to do/ too much hassle

Don't have time to do it

Costs too much/ it's expensive to do

I'm not convinced it's the right thing to do

It's not up to me/ not my decision

There's a lack of good public transport near me

I enjoy driving and don't want to take public transport instead

I don't feel safe using public transport

I don't feel confident using public transport

I'm not able to use public transport

I don't know of any car sharing schemes locally

I don't know

Other (write in)

Q7g. What is preventing you from repairing things instead of buying new?

Never really thought about it

I need more information about how to do it

It's hard to do/ too much hassle

Don't have time to do it

Costs too much/ it's expensive to do

I'm not convinced it's the right thing to do

It's not up to me/ not my decision

I don't have the right equipment or skills

I enjoy shopping for new items

I don't know

Other (write in)

Q7h. What is preventing you from reducing what you buy?

Never really thought about it

I need more information about how to do it

It's hard to do/ too much hassle

Don't have time to do it

Costs too much/ it's expensive to do

I'm not convinced it's the right thing to do

It's not up to me/ not my decision

I don't have the right equipment or skills

I enjoy shopping for new items

I'd prefer to have my own things rather than borrow from other people

I don't know

Other (write in)

Q7i. What is preventing you from shopping sustainably?

Never really thought about it

I need more information about how to do it

It's hard to do/ too much hassle

Don't have time to do it

Costs too much/ it's expensive to do

I'm not convinced it's the right thing to do

It's not up to me/ not my decision

I like the brands I currently buy and do not want to change

I don't know

Other (write in)

Q7j. What is preventing you from eating locally and sustainably?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision
I'm not convinced it is good for my health
It's difficult with my food intolerances / dietary requirements

I don't know

Other (write in)

Q7k. What is preventing you from flying less?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision
It's less convenient to travel using alternatives (e.g. it's slower, harder to arrange, involves more changes)
I enjoy flying
I don't go on holiday/ take flights

I don't know

Other (write in)

Q7l. What is preventing you from adapting your home to make it more energy efficient?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision
It's inconvenient (e.g. disruptive, time-consuming)

I don't know

Other (write in)

Q7m. What is preventing you from installing a smart meter?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision

I don't know
Other (write in)

Q7n. What is preventing you from switching to a green energy tariff?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision

I don't know
Other (write in)

Q7o. What is preventing you from switching to renewable energy?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do
It's not up to me/ not my decision

I don't know
Other (write in)

Q7p. What is preventing you from switching to a lower emissions vehicle (e.g. hybrid or electric)?

Never really thought about it
I need more information about how to do it
It's hard to do/ too much hassle
Don't have time to do it
Costs too much/ it's expensive to do
I'm not convinced it's the right thing to do

It's not up to me/ not my decision
I like my current car and haven't found an electric vehicle I prefer
I don't want an electric vehicle
I don't have a car/ don't drive
I have recently bought a new car
I can't install a charger (I live in a flat or terraced house)
I'm worried that there are not enough charging points across Wales

I don't know
Other (write in)

Q8. Which of the following actions do you think will have most impact on tackling climate change? Please choose the three you think would have the biggest impact.

[Select up to three only]

- a) reducing your home energy and water use
- b) driving less and walking or cycling more
- c) recycling more
- d) reusing things where possible
- e) reducing your food waste
- f) driving less and use public or shared transport more
- g) repairing things instead of buying new
- h) reducing what you buy
- i) shopping sustainably
- j) eating locally and sustainably
- k) flying less
- l) adapting your home to make it more energy efficient
- m) installing a smart meter
- n) switching to a green energy tariff
- o) switching to renewable energy
- p) switching to a lower emissions vehicle (e.g. hybrid or electric)

Q9. How concerned are you personally about climate change? Please tick one

Very concerned
Fairly concerned
Not very concerned
Not at all concerned
Don't know