Consumer Scotland

Luchd-Cleachdaidh Alba

Consumer perceptions of and engagement with the transition to net zero

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Contents

1. Executive Summary

This report highlights key findings from research conducted on behalf of Consumer Scotland on consumer perceptions of and engagement with net zero. We found that consumers are concerned about climate change but are unclear about how the journey to net zero will be achieved and how their actions can contribute to meeting climate targets. Three-quarters (76%) of our survey respondents stated that they are either 'very' or 'fairly' concerned about this issue but less than a third (28%) said they knew a lot about what they need to do to help Scotland reach net zero by 2045.

Participants in our qualitative research view net zero as a distant concept, related more to science and politics than to the behaviour of individuals. They do not consider 'net zero' in their day-to-day lives nor view their everyday behaviours through this lens. Many consumers have limited awareness of specific policies and terminologies surrounding net zero.

Although many consumers express concern about climate change, this is not resulting in action that meets the pace and scale of change that is required. While more than half (52%) of respondents to our survey research stated that they are very/somewhat likely to change their purchasing behaviour in the next year as a result of environmental concerns, only 10% of respondents stated they were very likely to do so.

Consistent with literature on the efficacy of behaviour change interventions that making things more convenient or easier to access is the most reliable way to effect meaningful change[1], we find that cost and convenience remain key factors which drive consumer purchasing decisions. Even where consumers do take sustainable actions, these are often more influenced by ease and cost than by the overall environmental benefits.

Consumers are seeking clearer leadership and guidance to help them to make the choices that will help to tackle climate change. A majority (63%) of respondents ranked the UK Government and the Scottish Government (60%) as most responsible for reducing emissions. Fewer (16%) of our survey respondents ranked consumers as most responsible for reducing emissions, with most ranking them last (59%). However, although consumers see themselves as having less responsibility than government or industry, they still want to understand how they can play their part and have a positive impact on climate issues.

Only 28% of our survey respondents said they know a lot or completely about what they need to do to help Scotland reach net zero by 2045, illustrating the challenge faced if these ambitious targets are to be met. We need a systemic approach to underpin fair and effective consumer engagement in the transition to net zero. This means government needs to create an enabling environment where it is easier for consumers to make the changes which are being asked of them. Making sustainable choices more cost-effective and convenient for consumers is central to a successful transition, as our climate targets are unlikely to be met without this.

Public engagement and information strategies need to be tailored to recognise the range of factors that may encourage consumers to engage in the net zero journey. It will be important to build consumer literacy on the topic of climate change, helping consumers understand the impact of individual actions. Further action is also needed to highlight the wider range of benefits that can flow from taking action.

2. Who we are

2.1 Consumer Scotland is the statutory body for consumers in Scotland. Established by the Consumer Scotland Act 2020, we are accountable to the Scottish Parliament. Consumer Scotland's purpose is to improve outcomes for current and future consumers and our strategic objectives are:

- to enhance understanding and awareness of consumer issues by strengthening the evidence base
- to serve the needs and aspirations of current and future consumers by inspiring and influencing the public, private and third sectors
- to enable the active participation of consumers in a fairer economy by improving access to information and support

2.2 Consumer Scotland uses data, research and analysis to inform our work on the key issues facing consumers in Scotland. In conjunction with that evidence base we seek a consumer perspective through the application of the consumer principles of access, choice, safety, information, fairness, representation, sustainability and redress.

2.3 Our general function is to provide consumer advocacy and advice with a view to achieving more positive consumer outcomes. We also have a role in a promoting sustainable consumption of natural resources, and other environmentally sustainable practices in relation to the acquisition, use and disposal of goods by current, and future, consumers in Scotland.

2.4 In carrying out these functions and in order to achieve our strategic objectives, our intention is to understand and track consumers' priorities for and experience of the transition to net zero. We will use our insights to help advocate for policy that takes into account the needs and priorities of consumers and to inform our understanding of how the transition can be made easier for consumers in vulnerable circumstances.

3. Introduction

3.1 Climate change refers to long-term shifts in temperatures and weather patterns. Such shifts can be natural, due to changes in the sun's activity or large volcanic eruptions. But since the 1800s, human activities have been the main driver of climate change,[2] primarily due to the burning of fossil fuels like coal, oil and gas.[3] It is firmly established that Scotland's climate is changing faster than expected and this will have a wide range of impacts on consumers, communities and businesses in Scotland. This may include catastrophic impacts on food production, critical infrastructure and on efforts to protect peatlands which store carbon.[4]

3.2 Climate change will present both challenges that require urgent action to resolve as well as opportunities to build a better and more sustainable society. The transition to net zero has the potential to bring about a number of benefits such as reliable and skilled green jobs, warmer homes, healthier places and communities as well as improvements to nature and biodiversity.[5] To achieve net zero, Scotland's total greenhouse gas emissions must be equal to or less than the emissions removed from the environment. This can be achieved by a combination of emissions reduction and emissions removal.[6]

3.3 All sectors in the Scottish economy will need to play their part in the transition to net zero, and households, businesses and communities will need to make changes to their lifestyles, business practices, and consumption habits. The Climate Change Committee (CCC) has estimated that over 60% of the emissions reductions that will be needed to meet net zero will be predicated on some kind of individual or societal behavioural change.[7]

3.4 Although the opportunities arising from the transition are substantial, many of the changes that will be needed to meet net zero targets will require consumer buy-in and participation, along with changes in how consumers engage with many services and markets.[8] This comes at a time when consumers face a range of other financial challenges and pressures. Successful implementation of any climate change plan will require clear political leadership and improved public understanding of the impacts and outcomes of both government policy and individual actions.

4. Background

4.1 The Scottish Parliament has legislated on climate change, setting Scotland's emissions reduction targets to net zero by 2045 and revising interim and annual emissions reduction targets.[9]

4.2 In April 2024, the Scottish Government stated that the existing interim target for emission reduction by 2030 was beyond what could be achieved by that date, but that it remained committed to achieving the overall target of net zero emissions by 2045.[10] It has subsequently introduced further legislation to amend its approach to setting targets for carbon emission reduction.[11] The Climate Change (Emissions Reduction Targets) (Scotland) Bill will amend the Climate Change (Scotland) Act 2009. The Scottish Government intends that the Bill will establish a carbon budget approach to target setting, similar to the approach already taken elsewhere in the UK, with carbon budgets set through secondary legislation using the latest advice from the CCC.[12]

4.3 The most recent Scottish Greenhouse Gas Statistics show that Scotland missed the 2022 interim target, [13] meaning it has now failed to meet nine out of the last 13 targets. This highlights the gap between the ambitious targets and the response across many areas, particularly where those depend on changing consumer behaviour. Domestic transport, for example, continues to be the highest emitting sector with emissions from both international aviation and shipping and domestic transport increasing significantly since 2021.[14]

4.4 For consumers to play their role in the transition to net zero they will need an effective, supportive and enabling framework in place to support them to take more sustainable decisions. This overarching framework should cover key consumer interests around information, regulation, access, quality, protection and redress. Creating an environment where more sustainable consumer decisions are the default will be key. The measures put in place must be designed for and responsive to the needs and priorities of consumers, including those in vulnerable circumstances or on low incomes.

5. About this report

5.1 Consumer Scotland's Strategic Plan for 2023-2027 sets out three cross-cutting themes which inform our focus and priorities across this period.[15] Understanding and influencing Scotland's approach to climate change to ensure that this delivers effectively for consumers is one of these key themes.

5.2 In 2023/2024 we significantly expanded our evidence base by commissioning six research projects across a range of consumer markets. These projects used a range of research methods to examine in detail consumers' attitudes, experiences, beliefs, behaviours and perceptions related to the transition to net zero and wider climate change adaptation and mitigation.

5.3 These projects were:

- A quantitative survey of consumers' general attitudes to net zero
- Qualitative research on consumers' participation in net zero
- A survey of current and prospective electric vehicle drivers
- Qualitative research with homeowners who had installed heat pumps and/or solar photovoltaic panels
- Deliberative research looking at the future of Scotland's water sector as it responds to the challenges of climate change
- Qualitative research exploring the decarbonisation of postal services with consumers and small businesses

5.4 This report draws primarily on the findings from two of these projects:

- A quantitative survey of consumers' general attitudes to net zero, and
- A qualitative project which explored consumers participation in the transition to net zero.

5.5 The report presents our key messages and recommendations emerging from these studies.

5.6 When we refer to net zero in this report we use the definition of net zero used by the quantitative survey which was 'achieving a balance between the amount of greenhouse gases released into the atmosphere by absorbing an equivalent amount from the atmosphere'. Where we use the term climate change in this report it is intended to mean the long-term shifts in temperatures and weather patterns accelerated by human activity.

6. Methodology

6.1 The quantitative survey was conducted by YouGov Plc, which expanded on our previous survey research conducted by the Diffley Partnership in 2023.[16] Fieldwork was undertaken between 26th February and 5th March 2024. The survey covered topics including people's general perceptions of climate change and net zero and the extent to which they considered the environment in their general purchasing decisions. The survey also included in-depth analysis on attitudes towards sustainability in a number of consumer markets, including clothing, transport, food and drink, online purchasing and tourism. The achieved sample was n=2,062 which was representative of all adults living in Scotland aged 16+. The sampling approach used was quota sampling, with quotas taken from the 2021 Census.

6.2 The qualitative project was conducted by Thinks Insight & Strategy and consisted of 57 individuals taking part in the research. It involved 30 individuals participating in a 7-day online community (or online ethnography) and 27 individuals taking part in one of 6 online focus groups. Fieldwork took place between 6th and 25th March 2024.

6.3 For the online community, participants individually completed activities such as daily diaries, reflective questions, and polls designed to explore their attitudes, behaviours, and the barriers they experienced in making sustainable purchase decisions. For the online focus groups, topics were explored further in a social setting to understand how individuals' reports of attitudes, behaviours and perceived barriers varied when around others.

6.4 Responses from both research stages were analysed thematically, allowing for the identification of key trends and differences within and between participant groups. The sample included participants from a range of locations, ages, income levels and property ownership status. Participants also had a range of attitudes regarding the immediacy of climate change as a problem. A combination of attitudinal and behavioural metrics were used by Thinks to assign each participant an 'eco-attitude label'. These labels were used by Thinks to organise the participants into broad groupings based on how immediate a problem they felt climate change to be and the steps they were currently taking to address it.[17] The project made use of the ISM behavioural model, developed by the Scottish Government, which looks at the key influences operating at the individual, social and material (ISM) levels.[18] The ISM model was used by Thinks to consider intervention opportunities needed to address key consumer barriers to change.

7. Key findings

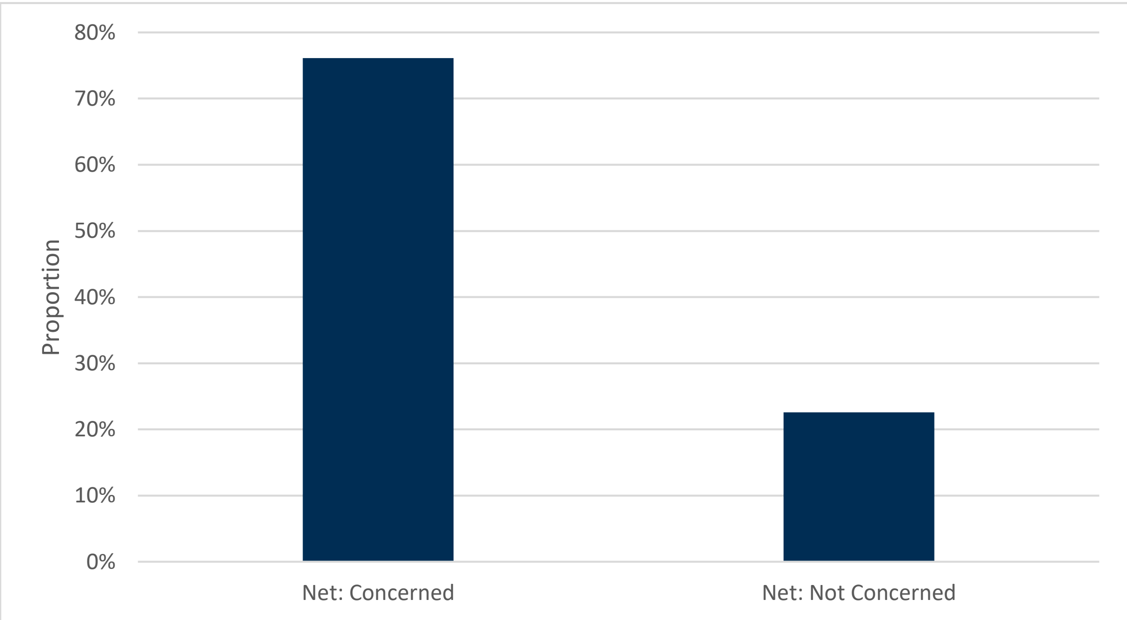
Consumers are concerned about climate change – but are unclear how the journey to net zero will be achieved and how their actions can contribute to meeting emissions targets

7.1 Our latest survey research conducted by YouGov reconfirmed our previous findings that consumers are generally concerned about climate change and the environment (see Figure 1). Three in four (76%) respondents stated that they are either 'very' or 'fairly' concerned about climate change and the environment. Around one in four (23%) stated they are 'not very' or 'not at all' concerned.[19]

7.2 While reported concern is high in all groups, it is particularly notable for young people (85% of those aged 16-24 and 84% of those aged 25-34), compared to those aged 55-64 (71%) and those aged over 65 (72%). Statistically significant differences can also be seen between social grade categories, with 81% of those in higher social grades (ABC1) vs 72% of those in lower social grades (C2DE) stating that they are concerned about climate change.[20]

Figure 1: Three quarters of consumers state they are generally concerned about climate change

Proportion of respondents stating they are concerned or not concerned about climate change



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7.3 Our qualitative research, delivered by Thinks Insight and Strategy, also highlighted that self-reported awareness of climate change is generally high. However, the degree of concern and the extent to which participants feel it will affect them personally varies depending on how urgent they feel climate change is when compared to other issues. It is also affected by the level of responsibility they feel for it.[21]

7.4 Taken together, our research findings are also consistent with other evidence. For example, the 2022 Scottish Household Survey found that the proportion of adults in Scotland viewing climate change as an immediate and urgent problem has risen to 74% from 68% in 2019.[22] In addition, the UK Government Public Attitude Tracker found that in Winter 2023 80% of people stated they were very or fairly concerned about climate change, with 37% being very concerned.[23]

7.5 The most recent wave of the UK Government Public Attitude Tracker also found a small increase in public awareness of the concept of net zero, with 91% of people reporting that they had heard of the concept, compared to 89% in the previous wave.[24] Further, the Public Attitude Tracker also found that knowledge levels were increasing, with 53% saying they knew ‘a lot’ or ‘a fair amount’ about climate change, up from 50% in Winter 2023. A further 17% said they knew ‘a lot’, up from 15% in Winter 2023.

7.6 However, our evidence indicates that many consumers have limited awareness of specific policies and terminologies surrounding net zero. For example, in our qualitative research we found that although many of the research participants stated that they are trying to make more environmentally conscious choices, such as recycling more, they are often not doing this with the goal of reaching net zero in mind. This is illustrated by a participant in our qualitative research who stated:

> “I don’t use single use plastic anymore, I walk or cycle whenever I can rather than using the car, I fully recycle… I honestly think I do these things to feel less guilty rather than thinking that they are making much of a difference.” (Female, Eco-Reactive, Urban, 26-35)

7.7 Participants often saw net zero as a distant concept, which was related more to science and politics than to the behaviour of individuals. Participants were not considering ‘net zero’ in their day-to-day lives nor viewing their everyday behaviours through this lens. Where participants were consciously engaging in sustainable behaviours, this was usually motivated by other factors, such as saving money or a general desire to be more environmentally-friendly rather than being part of any wider net zero framework or contributing to emissions reduction.[25]

7.8 Our qualitative research also found that some of the language and terminology being used by government and stakeholders can act as a barrier to effective consumer engagement and participation.[26] Individuals reported they can find it challenging to work out what the language means. For consumers to understand the impact that the transition to net zero will have on their lives and the role they will be required to play, our research indicates that the language used must be clear, accessible and helpful.

7.9 Our qualitative research indicated that some terminology regarding net zero was not well understood by participants, with some not able to relate these terms to their own behaviours and choices. While participants were able to make links between the concept of net zero and reducing emissions, many were unable to go beyond this. Self-reported awareness of specific government policies relating to net zero was low in our qualitative research, with the exception of the phasing out of petrol and diesel vehicles. Where participants did have a better understanding of language, this generally related to terms that felt more intuitive and easy for them to understand, such as 'decarbonisation' or 'greenwashing'.[27] Understanding of terms appears notably lower where terminology is newer or less frequently used, and particularly when language is felt to be vague, unintuitive or frustrating, for example 'blue green infrastructure' or 'circular economy'.[28] [29] This is illustrated by a participant in our qualitative research who stated:

> "It could mean a million things, I can just imagine a think tank thinking up [blue green infrastructure] and imagining it was great, but what does it mean to us." (Female, Eco-reactive, Urban, 65+)

7.10 Given this, it is unsurprising that our research shows that while many consumers in Scotland say they are concerned about climate change, the majority are unsure about how they can personally contribute to the transition to net zero. Only 28% of our survey respondents said they know a lot/completely about what they need to do to help Scotland reach net zero by 2045. This is illustrated by a participant in our qualitative research who stated:

> "Most information comes from politicians, energy companies with vested interest and salespeople. I don't trust any of them. I would like to see an independent body (not linked with government etc) to make enforceable, difficult and pragmatic choices based on the conditions in Scotland." (Male, Eco-reactive, Rural, 46-55)

7.11 Almost a third (31%) of respondents stated they know nothing/not much and 42% are in the middle on a 5-point scale of self-reported knowledge.[30] While women were more likely to say they were concerned about climate change, they were less likely than men to state that they were knowledgeable about how they can help Scotland reach net zero (33% of men vs 23% of women).[31]

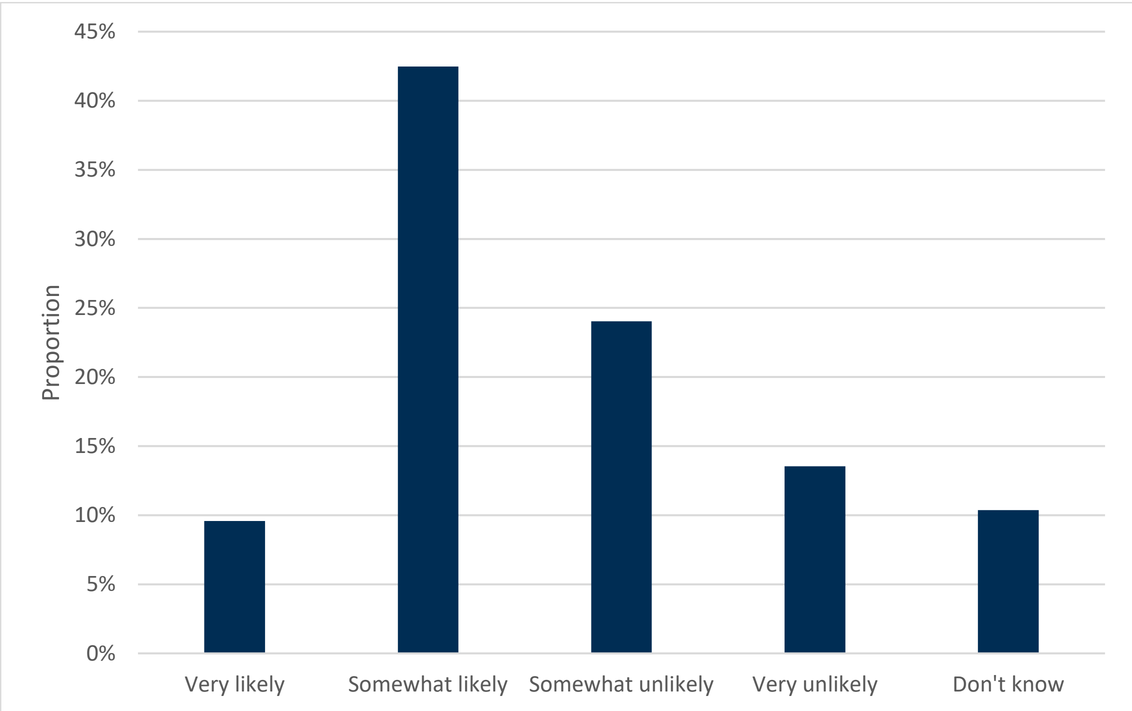
7.12 Other recent research indicates that public support for net-zero policies hinges on people having a clear understanding of the personal impacts of policies.[32] This includes being able to identify wider benefits of actions designed to address climate change (often referred to as co-benefits), as well as engaging with the potential costs of any change. These findings indicate that more work is needed to inform, steer and support consumers to commit to sustained and impactful behaviour change. The importance of building climate literacy amongst citizens has also been promoted by stakeholders, such as the Carbon Literacy Project, which seeks to develop 'carbon literate citizens' who understand how climate change will affect them and have the knowledge and skills to lower their own carbon footprint and support others to do the same.[33]

Levels of consumer concern about climate change are not resulting in action that matches the pace and scale of change required

7.13 Our survey research found that consumers who were more concerned about climate change were more likely to report that they had taken sustainable actions in the past. They were also more likely to say they would change their purchasing habits in the next year as a result of concerns for the environment. More than half (52%) of respondents to our survey research stated that they are very/somewhat likely to change their purchasing behaviour in the next year as a result of environmental concerns. However, our research pointed to a general lack of urgency among people in Scotland in moving towards more sustainable purchasing behaviours in the short term with only 10% of respondents to this question stating that they were 'very likely' to change their purchasing behaviour in the next year. (see Figure 2).[34]

Figure 2: More than half of consumers state they are very/somewhat likely to change their purchasing behaviour in the next year as a result of environmental concerns

Proportion of respondents stating they are likely to change their purchasing habits in the next year as a result of concerns for the environment

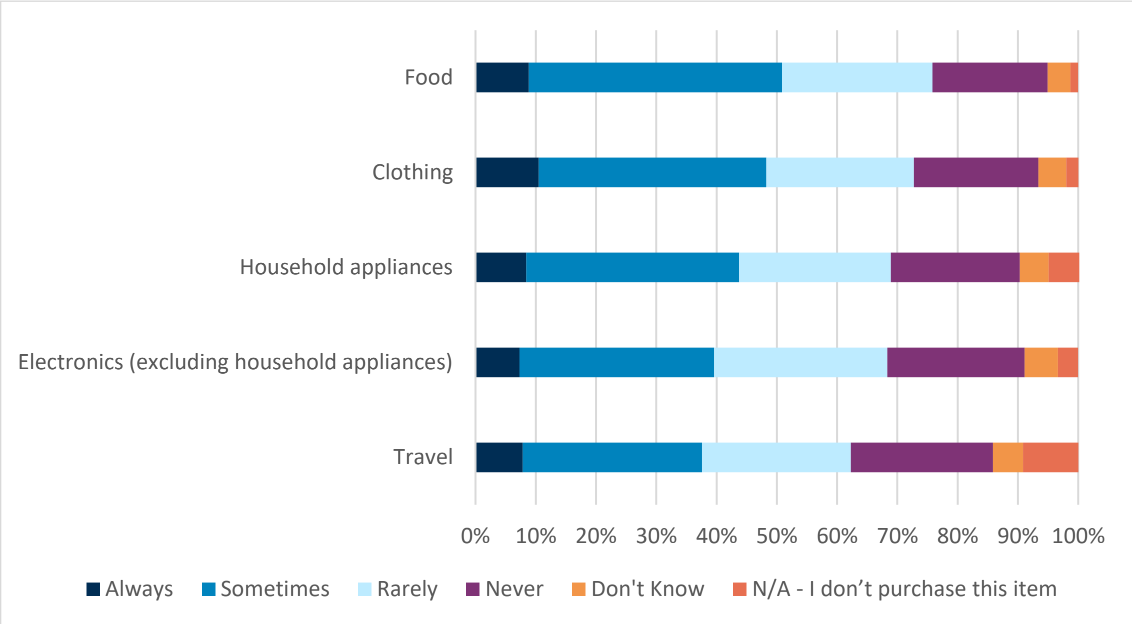


Base: 2,062

7.14 Our survey research also explored the extent to which consumers' purchasing decisions were affected by sustainability concerns across a range of common spending categories. Responses indicated that consumer concern about sustainability issues is fairly similar across the categories we asked about.[35] The category with the lowest level of respondents reporting that sustainability concerns always or sometimes influenced their purchases was travel (38%) and the highest was food (51%) (see Figure 3).

Figure 3: Consumer concern about sustainability issues is at a fairly similar level across a range of common consumer spending categories, but consumers are most concerned about sustainability issues in relation to food and least concerned in relation to travel

Extent to which respondents' purchasing decisions are affected by sustainability concerns across a range of common consumer spending categories



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7.15 The degree of general concern about climate change also appears to impact the extent to which consumer purchasing decisions are influenced by concern about climate change. Our survey asked respondents if they 'always or sometimes' consider sustainability when making purchasing decisions.

7.16 For those who are very/fairly concerned about climate change:

- 62% say sustainability concerns always or sometimes influence their purchasing decisions about food (compared to 51% for all respondents)
- 59% say sustainability concerns always or sometimes influence their purchasing decisions about clothing (48% for all respondents)
- 52% say sustainability concerns always or sometimes influence their purchasing decisions about household appliances (44% for all respondents)
- 48% say sustainability concerns always or sometimes influence their purchasing decisions about electronics (40% for all respondents)

- 47% say sustainability concerns always or sometimes influence their purchasing decisions about travel (38% for all respondents)

7.17 Those respondents who are less concerned about climate change were between 30 and 50 percentage points less likely to report that sustainability concerns influenced their purchasing decisions. Of those not very/not at all concerned about climate change:

- 17% say sustainability concerns influenced their purchasing decisions food (compared to 51% for all respondents)
- 13% say sustainability concerns always or sometimes influenced their purchasing decisions for clothing (48% for all respondents)
- 16% say sustainability concerns always or sometimes influenced their purchasing decisions about household appliances (44% for all respondents)
- 13% say sustainability concerns always or sometimes influenced their purchasing decisions for electronics (40% for all respondents)
- 9% say sustainability concerns always or sometimes influenced their purchasing decisions for travel (38% for all respondents)

7.18 However, it is less clear that general concerns about climate change are leading to concrete changes in consumer actions. When asked whether they had taken any of a range of more sustainable actions, respondents who were more concerned about climate change were not consistently more likely to take sustainable actions than those who were less concerned.

7.19 Our survey asked those who said they had taken more sustainable actions whether environmental concerns were a reason they did so. Those who were more concerned about climate change were much more likely to say environmental concerns influenced their actions. However, they were either no more, or only slightly more, likely to have taken the action in the first place.

7.20 This suggests that those with stronger concerns about climate change are not more likely to take sustainable action, but when they do take sustainable action they are more likely to report this as a motivating factor. Greater concern about climate change and the environment does not in itself lead to substantially more sustainable consumer behaviour or actions across the whole population. This is consistent with other research which suggests that although net zero is a priority for the public, many people do not see it as something that will change their lives in the next few years.[36]

7.21 This indicates that while many consumers understand the urgent need to act to tackle climate change, they are not currently making substantial, immediate changes in their behaviour. This is backed up by other research, such as the Intergovernmental Panel on Climate Change (IPCC) findings that the actions currently being taken by consumers do not match the scale or urgency of what is required.[37]

Cost and convenience remain key factors in driving consumer purchasing decisions. The sustainable actions that consumers do take are often more influenced by ease and cost than by environmental benefits

7.22 There is often a mismatch between the actions that people are currently taking to be more sustainable and the actions that will have the biggest impact.[38] Our qualitative research found that sustainable behaviours such as recycling which are perceived as accessible, low effort and already established social norms are embedded as everyday routines regardless of participant's views on sustainability.[39] Other research, including the UK Government Public Attitude Tracker, also found that the most frequently reported behaviours aimed at reducing the impacts of climate change related to minimising waste. Sustainable transport behaviours were the least frequently reported.[40]

7.23 Our qualitative research found that sustainability is not always a central consideration driving most participants' purchasing decisions. Other factors such as cost or convenience are more commonly identified as influencing decisions. This is illustrated by two participants in our qualitative research who stated:

> "I think there are just so many changes that they want to make that we're not ready for, like expecting everybody to own an electric car. I mean, the cost of that is ridiculous." (Female, Eco-active, Island, 23-35)

> "I don't want to reduce my standard of living by giving up my car. If alternatives are offered like electric cars etc., but that's not there for me yet. I'd need an electric or hydrogen car that can do 500 miles on a tank / charge, didn't cost the earth, and didn't change its value." (Male, Eco-reactive, Suburban, 50-65)

7.24 This is consistent with the literature on the efficacy of behaviour change interventions that making things more convenient or easier to access is the most reliable way to effect meaningful change[41]. In addition, the recent Net Zero Living report by Ipsos highlighted cost, convenience and the impacts of policies on consumer choice as key factors in influencing behaviour change.[42]

7.25 In our survey research there were some differences between reported levels of consumer willingness to change behaviour by sector. Food and drink and transport emerged as areas where larger proportions of respondents (65% for transport and 61% for food) said that they wanted to reduce the carbon emissions related to their consumption.

7.26 A majority of respondents reported that they had already taken a number of the actions listed in the survey which were associated with more sustainable consumption. Although many respondents stated that they want to reduce emissions and engage in more sustainable behaviours, the proportion who say they do so primarily for environmental reasons is much lower. This suggests that even where consumers are taking sustainable actions, sustainability is not necessarily a strong driver of choices in these areas. Rather, consumers prioritised cost, convenience and accessibility across all the markets we examined, with this being particularly notable with online purchasing and tourism, where sustainable consumption behaviours are least prevalent.[43]

7.27 These results are consistent with other research which finds that consumers are more likely to undertake behaviours that are familiar, cheaper and easier to undertake, such as recycling, reusing and buying second hand. [44] [45] By contrast, consumers appear less likely to undertake behaviours which would have a more substantial impact on household emissions, such changing diets or mode of transport or shifting to low carbon heating systems.

7.28 Our research provides some evidence that consumers who are more engaged with climate change are more likely to report that they consciously choose sustainable behaviours. However, as noted above, even amongst those reporting high levels of concern or awareness in relation to climate change, there is a general lack of urgency in adopting more sustainable purchasing behaviours. In addition, there remain a significant number of consumers for whom concern about climate change does not influence their purchasing decisions.

Consumers are seeking clearer leadership and guidance in order to enable them to make the choices that will help to tackle climate change

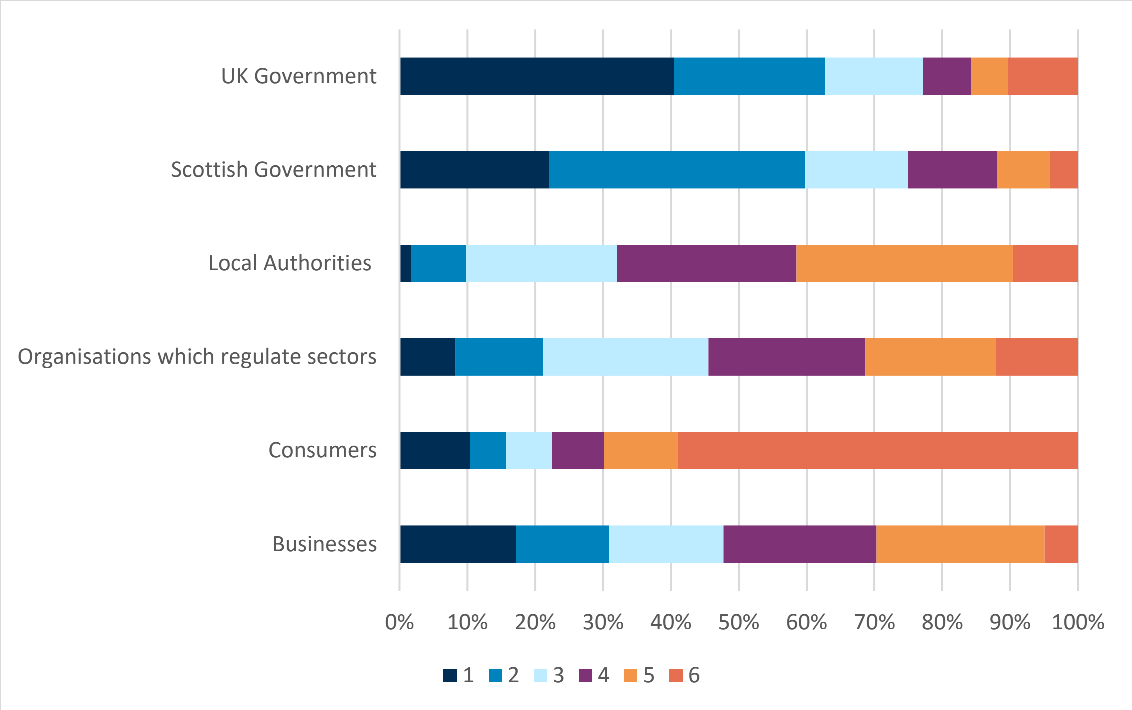
7.29 Consumption behaviours are shaped by factors including habits, social norms and expectations and can be very difficult to change. This is especially the case where behaviours are ingrained in daily routines or closely tied to family or work commitments.[46] Our research has shown that the main barriers to consumer behaviour change relate to cost, convenience and accessibility, which are often seen as more important than pursuing sustainability.

7.30 Many consumers appear particularly resistant to change if they hold a perception that more sustainable actions or behaviours will be inconvenient, disruptive or more costly. This is particularly the case for those individuals who are considering large-scale interventions. This finding is consistent with other research which has highlighted affordability, a lack of knowledge, a lack of accessible and trusted information to guide specific choices and a lack of policy coherence as barriers to consumer behaviour change.[47]

7.31 Our research also explored views on who was most responsible for tackling climate change. A majority of consumers believe responsibility for tackling climate change primarily rests with governments, businesses, and industry players. Far fewer respondents state that responsibility for reducing carbon emissions rests with consumers (see Figure 4). Only 16% of our survey respondents ranked consumers as most responsible for reducing emissions, with most ranking them last (59%). By contrast, 63% of respondents ranked the UK Government and 60% ranked the Scottish Government most responsible.[48]

Figure 4: Most consumers believe responsibility for tackling climate change primarily rests with governments, businesses, and industry players

Respondents ranking of who they think should take responsibility for reducing carbon emissions in Scotland. A higher rank (e.g. 1st) indicates a higher level of responsibility, and a lower rank (e.g. 6th) a lower level



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7.32 Beyond individual climate literacy, consumers look to government, businesses, and industry for leadership and guidance. While people care about climate change, they do not want to be left to take action alone and want to see governments stepping up and taking the lead on reaching net zero.[49] To help consumers change their behaviours in a real, long-term and impactful way there must be systemic action at all levels of government and industry.

7.33 Previous work by Audit Scotland has found that achieving net zero by 2045 and building climate resilience is difficult and complex, requiring whole system change. They note that the scale and extent of the required transformation across the public sector, society, and the economy is unprecedented, and urgent, and that coordinated action from all public sector bodies, and their partners, is needed.[50]

7.34 The Just Transition Commission (JTC) have also highlighted the importance of leadership and the crucial role of government in ensuring that the infrastructure is in place to support sustainable choices with clear pathways across sectors to support this.[51] Many interventions, such as those encouraging active and sustainable travel, cleaner energy or increased recycling, will require cross-sector work, identifying interdependencies and putting in place clear sequencing to support new systems. In many cases robust infrastructure and enabling frameworks will need to be put in place before consumers can be expected to make changes. These new systems and frameworks must aim to ensure that sustainable choices can become the “default” choice for consumers. Policy makers may wish to consider how tools such as the ISM framework can be used to indicate how cross-sector and multi-layered interventions may work in practice.

8. Key messages for policy and decision makers

A systemic approach is needed to support effective consumer engagement in the transition to net zero

8.1 While many participants told us they were concerned about climate change, a majority remain unsure about what they personally can do to help Scotland make the transition to net zero. The CCC has recommended that the UK Government should improve public engagement by communicating more clearly how people can most effectively reduce their personal emissions.[52]

8.2 Responsibility for dealing with climate change is seen primarily as a matter for governments and industry with consumers looking to them for leadership and guidance and for support to implement any necessary changes.[53] To support consumers to change their behaviours in a real, impactful and long-term way, there is an urgent need for systemic action at all levels of government and industry. Clear leadership will be needed in developing infrastructure and systems to facilitate sustainable behaviours. Making - and communicating - strategic decisions about investments and priorities will also be key to obtaining effective consumer engagement.

8.3 This system-level design should also consider the need for regulation, including the design of incentives, and the banning or taxing of problematic products where appropriate as part of the solution. This is consistent with the findings of the CCC, who have called for more support for people to make sustainable choices, including through providing regulation and incentives, where powers are devolved.[54]

8.4 The Scottish and UK Governments should undertake robust modelling and analysis of the impact of the changes required on consumers. This is especially necessary where high volumes of consumers must undergo a process of change in a short timeframe and where these changes will have substantial costs, such as in relation to travel choices or purchase of consumer goods.

8.5 Developing effective and targeted measures to support the consumer transition to net zero requires those who design and implement policies to have a clear understanding of consumers' attitudes, experiences, beliefs, behaviours and perceptions. In order to fully understand the changes consumers will need to make and create an enabling environment, it will be necessary to map out the consumer journey. The needs and priorities of consumers must be kept at the heart of the policy design process if the transition is to be successful.

8.6 It will also be important to conduct analysis and modelling of proposed measures, to guide both provision of targeted financial support and the implementation of regulation where required. There is a need to understand the costs of proposals and identify when and where these costs are likely to fall. Clear oversight of this will help to avoid any unintended consequences and minimise detriment for consumers. There is also a need for data that allows us to understand which consumers are most at risk of harm and what level of support will be required to effectively mitigate these risks. This will allow better focus on the needs of vulnerable groups.

8.7 Policy makers will need to consider consumers' awareness of, and ability and willingness to implement measures in order to identify and mitigate any issues and risks that may arise. Regulatory protection and redress measures must be incorporated into new markets from an early stage. Issues relating to supply chain and skills, quality assurance, funding mechanisms, consumer protection and redress should also be taken into consideration.

8.8 The timely publication of clear, robust plans, such as the updated Climate Change Plan, will be essential for consumers to understand both the impact of their actions and the implications of net-zero policies for them.

8.9 A robust understanding of these issues will allow governments and wider stakeholders to provide consumers with the right information and support, delivered in the right way, at the right time.

Making sustainable choices more cost-effective and convenient for consumers is central to a successful transition

8.10 The findings of our research show that the main barriers to consumers undertaking more sustainable behaviours relate to cost, convenience and accessibility. This is consistent with other research, including research that has found that consumers are concerned that the transition to net zero will cost them money they don't have.[55] The CCC have highlighted the importance of ensuring that the transition to net zero is affordable, especially at a time when household budgets are squeezed.[56]

8.11 Policymakers must ensure that all consumers can adopt more sustainable behaviours, carefully balancing the current, and future, costs to individuals and society and prioritising a just transition. Tools such as the ISM framework may be useful for indicating how cross-sector and multi-layered interventions may work in practice. Decision makers must also be honest about the costs of the transition to net zero while communicating the wider benefits of change in order to encourage buy in and engagement.[57]

8.12 For consumers to make these changes on a substantial enough scale to impact on our ability to meet emissions reduction targets, sustainable purchasing decisions must feel like the default, simple choice. Purchasing decisions are influenced by a range of factors, including convenience, speed of purchasing, ingrained behaviours and price. Sustainability considerations compete with these factors and our recent research, along with the other evidence we have consulted, has shown that sustainability concerns do not currently appear to drive consumer purchasing decisions, with many prioritising other factors such as cost and quality.

Public engagement and information strategies need to be tailored to recognise the range of factors that may encourage consumers to engage proactively in the transition to net zero

8.13 Our findings show that cost and convenience remain key factors in driving consumer purchasing decisions. The sustainable actions that consumers do take are often more influenced by ease and cost than by the overall environmental benefits.

8.14 Current public engagement strategies are at risk of only engaging those who are already interested in improving the sustainability of their lifestyles. More targeting of those who are not already engaged, and those whose actions can have the most impact, is required. Governments and other stakeholders will need to promote the wide range of positive outcomes and co-benefits that flow from more sustainable behaviours being adopted.

8.15 In particular, those consumers who are less likely to be influenced by environmental reasons for taking action will need targeted information and support in order to encourage them to move towards more sustainable behaviours. Providing information to promote the range of positive benefits that sustainable consumption can generate, such as economic growth, cost savings and health benefits, will be central to encouraging more sustainable action by consumers. These benefits can help to engage consumers who are not motivated by contributing to net zero as an end goal.

8.16 Using a range of bodies, and trusted intermediaries, to promote these messages may help to reduce barriers. For publications such as the forthcoming revised Climate Change Plan (and any public engagement strategy that follows) to be effective in driving change, trusted intermediaries and organisations must be engaged to reach those who will not be drawn in by more traditional sustainability outreach mechanisms. Information should be available in easy to find places, including the places where people go about their daily lives. These plans must tackle barriers, ensuring that mechanisms are in place to support consumer behaviour change, including taking the needs of consumers in vulnerable circumstances into account.

8.17 Information provided to consumers must be accessible, affordable and trustworthy as well as consistent across sectors. It must help consumers understand what actions they can take and the impact these actions will have, both in relation to meeting net zero targets and the range of wider benefits that can be achieved.

8.18 Information should be presented in ways that work for a range of consumers, in order to build climate literacy. It must take account of the diverse nature of consumers across Scotland, including those in vulnerable circumstances. Consumers in vulnerable circumstances, including those on low incomes, will need targeted support to ensure that they are not left behind and that the transition to net zero is a genuinely just one. While messaging should be consistent, this does not mean taking a one size fits all approach.

8.19 While ensuring that consumers have access to meaningful and trustworthy advice will be important, information alone will not be enough. Information provision must be situated within a clear framework, which provides incentives for sustainable use of resources, regulates problematic products and services and supports the design and development of more sustainable options. These systemic changes will help to make more sustainable options cheaper, easier and more accessible, ensuring that these become the default choice for consumers.

9. Recommendations

9.1 Scotland has now missed nine out of the last 13 targets set out in our climate change legislative framework. This highlights the gap between our ambitious targets and the response across many sectors, illustrating the need for a step change in the urgency and scale of response.

9.2 The Scottish Government has brought forward a new Bill to revise this legislative framework, with 5 year carbon budgets being set by secondary legislation following the passage of the Bill.[58] The CCC is now expected to provide advice on carbon budgets levels in Spring 2025, and the Scottish Government states that the next Climate Change Plan will be brought forward as soon as practicable after this. It will be important that this timetable does not slip and that there are no further delays to this process.

9.3 It is also important that the revised Climate Change Plan is detailed, credible, robust and commits to tangible measures, backed by fully costed budget commitments, which can be delivered within the relevant timeframes. The Plan provides an opportunity to provide much needed leadership and guidance for consumers and will be key in achieving the level of behaviour change required. Publishing the revised plan will allow for clarity and confidence in targets put in place to achieve net zero, along with clear allocation of roles and responsibilities for delivering each aspect of emissions reduction and adaptation.[59]

9.4 Meeting our net zero targets in future will depend, in large part, on changing consumer behaviour. However, the new Climate Change Plan and any behaviour change strategy needs to be implemented as part of a wider system of change.

9.5 We recommend that this wider system change is based on the following action by **Governments:**

- Both the UK and Scottish Governments should work collaboratively to identify critical infrastructure and enabling factors to support the transition which needs to be put in place in key markets such as transport, housing, energy and construction
- When developing plans such as the Climate Change Plan, the Scottish Government should determine how actions need to be sequenced to take account of interdependencies between sectors and prioritise strategic investment decisions accordingly
- The Scottish Government should carry out modelling and analysis of key change processes that consumers will be required to navigate. This should be part of the process of developing plans such as the Climate Change Plan and should include

mapping out the journey that consumers will take when changing key behaviours that impact on our ability to meet targets, such as home heating and transport choices. Doing this will help to ensure that consumers are kept at the heart of policy making and reduce the risk of policies causing unintended harm to consumers

- The Scottish Government should continue to work with key stakeholders to assess whether critical components such as supply chains and skills in the workforce are sufficiently developed across sectors to deliver change at the speed and scale required, whilst protecting consumers from harm. The Scottish Government should give consideration to this through future iterations of the Climate Emergency Skills Action Plan
- Both the Scottish and UK Governments should consider how making sustainable choices will affect different groups of consumers, both now and in the future, and determine the fairest way of allocating consumers' share of costs in the fairest way between different groups
- Behaviour change models, such as the Scottish Government's ISM tool, should be used to support the development of interventions to help remove barriers to consumer action. The Scottish Government should consider this in the Climate Change Plan along with sectoral Just Transition Plans. This should include consideration of recommendations from the Just Transition Commission along with considering the provision of targeted support, including financial assistance for those who may otherwise be unable to make changes, to ensure that all consumers can be part of the transition
- The Scottish and UK Governments should work collaboratively and engage with stakeholders to identify where consumers will need dedicated information, advice and support to make changes. Consumer information and consumer protection measures should be built in from the beginning, along with routes to redress to allow things to be put right swiftly, when transactions go wrong
- As part of future iterations of the Net Zero Nation public engagement strategy, the Scottish Government should work with stakeholders to develop cross-sectoral public engagement strategies and campaigns to build consumer climate literacy. These should use clear and consistent language to explain the changes required and the benefits that changes in behaviour can bring. These public engagement strategies should be targeted at a wider range of groups, including those who are not currently making sustainable changes and those who can make the changes which will have the most impact on our ability to meet our targets
- The Scottish and UK Governments should work collaboratively, including through engaging with key stakeholders and enforcement bodies, to ensure that regulatory, standard setting and enforcement powers and resources are sufficient to meet the challenges that new and developing markets will bring. This will help to ensure that consumers can access products which are safe, of acceptable quality, and meet their needs

9.6 **Regulators should**:

- Work with utility suppliers and providers to consider how they can be incentivised to make more sustainable products available
- Examine whether regulation may be required to remove less sustainable options from the market or restrict their usage over time, for example through secondary legislation implemented under the Circular Economy (Scotland) Bill or other UK wide legislation
- Support consumers to make decisions with confidence. Regulators such as the Competition and Markets Authority and Advertising Standards Authority should work to ensure that consumers are protected from greenwashing or false or misleading environmental claims and consider if current legislation is sufficient to protect consumers from harm
- As any new regulatory or legislative change comes into force, work with stakeholders to ensure consumers can access accurate, helpful, verifiable information to support them making more sustainable choices
- The UK Regulators Network should continue its work to articulate the role of regulators in the delivery of net zero. It should facilitate partnership working amongst members to ensure that boundaries of regulation are smooth and robust, protecting consumers from the risks that can result from tensions, gaps or overlaps in regulatory boundaries

9.7 Finally, **businesses and third sector bodies should**:

- Consider what changing consumer demand and regulatory frameworks might mean for their own supply chains, training and development and purchasing decisions

10. Next steps

10.1 Consumer Scotland works to improve outcomes for current and future consumers in Scotland. As set out in our Strategic Plan, one of our three cross-cutting themes is climate change adaptation and mitigation. Our future work in this area will include:

- The publication of the remaining research projects outlined in point 5.3
- Continuing our advocacy work on areas including the Heat in Buildings Bill and the Circular Economy Bill
- The publication of findings of our investigation on consumer protection in the green home heating market[60]

10.2 This report is part of ongoing work by Consumer Scotland and will be followed by other outputs on topics including the circular economy. We will continue to work with stakeholders, using our insights to advocate for action by government, regulators and businesses that delivers positive outcomes for consumers. We will work to promote sustainable consumption of natural resources, and other environmentally sustainable practices in relation to the acquisition, use and disposal of goods by consumers in Scotland.

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