

Ethical Lifestyles - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of COVID-19 on consumers' ethical behaviours and attitudes.
- The extent to which consumer groups consider the environment when making decisions.
- Frequency of selected environmentally friendly behaviours.
- Motivators behind environmentally friendly behaviours.
- Attitudes towards corporate sustainability and societal ethics.
- Consumer perceptions of what makes an ethical company.
- Categories consumers are most likely to consider ethics when buying.

The coronavirus pandemic was undoubtedly a distraction from environmental and sustainability concerns, as governments, businesses and consumers alike became focused on limiting transmission of the virus and protecting people. However, within this worrying climate, it is also perhaps encouraging to see that 26% of all adults consider the environment to be a higher priority now than before the COVID-19 outbreak.

In some respects, the outbreak posed a reprieve for the environment, as lockdown measures helped to significantly curb greenhouse gas emissions around the world. And yet, as PPE became mandatory in a range of out-of-home scenarios, single-use masks and gloves began to accumulate in the environment. 75% of all adults say that the focus on hygiene caused by the COVID-19/coronavirus pandemic is causing a surge in waste, underpinning opportunities for businesses to further enhance their efforts to cut waste and help to clear up the environment.

But to be seen as ethical is not just about being green, and consumers are increasingly expecting brands to be more vocal on social issues. This is particularly true for the young, with a high proportion agreeing that brands should be involved with campaigning for social equality. Many brands were quick to speak out in support of the 2020 BLM protests around the world, but have since come under fire for not doing enough to drive real social change,



"The coronavirus pandemic has undoubtedly been a distraction from environmental and sustainability concerns for many people, businesses and the government. However, it is important to note that for many consumers it has only strengthened their resolve to do more to protect the planet."

- Katie Martin, Research Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Ethical Lifestyles - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



illustrating the high standards that consumers are holding brands to when it comes to being ethical.

Brands can take a more actionable approach when it comes to tackling social issues by showing what they are doing to drive change. Just as businesses are embedding sustainability into their core ethos, it is important that they are also making the structural changes needed to cultivate real diversity in the workforce and to foster an atmosphere of inclusivity.

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions

EXECUTIVE SUMMARY

Impact of COVID-19 on ethical lifestyles
 Figure 1: Short, medium and long-term impact of COVID-19 on ethical lifestyles, 2021

- The market
- The UK's growing population will put further pressure on resources
- Lockdowns aid sharp downturn in greenhouse gas emissions...
- ...but excess waste climbs as hygiene concerns drive PPE and packaging consumption
- BLM protests raise awareness of social inequalities
- The consumer
- Environment now a higher priority for a quarter of all adults
 Figure 2: How consumers prioritise the environment since the
 start of the COVID-19 outbreak, 16 April 2020-12 February
 2021
- Environmentalism impacts consumer decision-making
 Figure 3: Frequency of considering the environmental impact in decision-making, 2021
- Protecting the planet proves top eco driver
 Figure 4: Reasons for considering the environmental impact when decision-making, 2021
- Rise of modern green behaviours
 Figure 5: Frequency of selected ethical behaviours, 2021
- Environmental efforts and social welfare both important
 Figure 6: How consumers define what makes a brand or
 company ethical, 2021
- Consumers most ethical when buying FMCG
 Figure 7: Consideration of how ethical a sector is before purchasing, 2021

ISSUES AND INSIGHTS

- COVID-19 makes the environment a higher priority
- Consumers expect brands to be vocal and help make social change

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



THE MARKET - KEY TAKEAWAYS

- The UK's growing population will put further pressure on resources
- BLM protests raise awareness of social inequalities
- COVID-19 puts more focus on value for money
- · Lockdowns aid sharp downturn in greenhouse gas emissions
- Plastic waste remains a concern as recycling rates stall

MARKET DRIVERS - SOCIAL FACTORS

The UK's growing population will put further pressure on resources

Figure 8: UK population estimates and projections, 1990-2041

- BLM protests raise awareness of social inequalities
 Figure 9: Managers, directors and senior officials in employment in the UK, by ethnic group, 2014 and 2019
- COVID-19 puts more focus on value for money
 Figure 10: The financial confidence index, 2021
- G7 announces tax reforms

MARKET DRIVERS - ENVIRONMENTAL ISSUES

- · PPE waste falls into the environment
- CO2 emissions fall as a result of the COVID-19 outbreak
 Figure 11: Estimated total greenhouse gas emissions, UK,
 1990-2020
- Transport proves leading source of greenhouse gases
 Figure 12: Estimated total greenhouse gas emissions, UK, by sector, 2019
- COVID-19 drives surge in plastic waste in 2020...
- ...but recycling rates plateau

 Figure 12: Waste collected from how

Figure 13: Waste collected from households, by country, 2010–18

Levels of food waste remain high

COMPANIES AND BRANDS - KEY TAKEAWAYS

- Food and drink brands and retailers look to tackle food waste
- Brands look to tackle hard-to-recycle materials...
- · ...including recycling single-use masks
- Fashion brands look to close the loop

LAUNCH ACTIVITY AND INNOVATION

 Environmentally friendly packaging claims lead ethical claims amongst new product launches

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 14: Proportion of launches carrying ethical and environmental claims, January 2016-April 2021

- Food and drink brands and retailers look to tackle food waste
- Tesco to sell unwashed potatoes to cut down UK's number one wasted food
- Animal Crossing joins with Hellmann's to tackle food waste
 Figure 15: Hellmann's partners with FareShare, December
 2020
- McDonald's pledges to redirect food whilst also pledging to cut plastic waste
- Brands look to tackle tricky-to-recycle materials
- Beauty recycling schemes
- Barbie manufacturer Mattel launches plastic toy send-back service
- Utilita Energy teams up with David James to launch Football, Rebooted
- Retailers and brands encourage the recycling of single-use masks
- Wilko launches the UK high street's first disposable face mask-recycling scheme
- The Sun partners with Morrisons to launch face maskrecycling scheme

Figure 16: The Sun's partnership with Morrisons' Mask Force' campaign, June 2021

- · Fashion brands look to close the loop
- M&S brings back its Shwopping scheme
- French Connection and Hush team up with Thrift+
- Clothing rental schemes also increase

THE CONSUMER - KEY TAKEAWAYS

- Pro-hygiene behaviours leave mark on the environment
- Greener delivery solutions needed
- Tightening household budgets could undermine ethical buying choices
- Environmental claims factor in consumer decision-making
- Consumers consider the environmental impact of food waste
- Rise of trendy green behaviours
- Fashion looks to close the loop
- Ethical brands garner strong appeal
- Supporting smaller businesses can improve ethical impression

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- Environmental efforts and social welfare both important
- Consumers display a lower interest in ethics when it comes to financial services

IMPACT OF COVID-19 ON ETHICAL LIFESTYLES

Consumers need solutions to PPE waste

Figure 17: Mintel COVID-19 perceived importance of mask wearing when shopping in-store, 6 August-1 October 2020

Environment now a higher priority

Figure 18: How consumers prioritise the environment as a result of the COVID-19 outbreak, 16 April 2020-12 February 2021

Rise in online shopping poses environmental problems

Figure 19: Proportion of adults shopping more online since the start of the COVID-19 outbreak, April 2020- April 2021

COVID-19 lessens plastic packaging concerns

Figure 20: Statements surrounding packaging and COVID-19, 18-24 June 2020

 Tightening household budgets could drive a downturn in ethical buying

Figure 21: Financial situation as a direct result of the COVID-19 outbreak, 14 May 2020-12 March 2021

CONSIDERING THE ENVIRONMENTAL IMPACT WHEN DECISION-MAKING-MAKING

Environmentalism impacts consumer decision-making
 Figure 22: Frequency of considering the environmental impact in decision-making, 2021

Younger adults more likely to consider their environmental impact...

Figure 23: Frequency of considering the environmental impact in decision-making, by age, 2021

- ...but strong eco habits of older consumers prove true eco credentials
- City dwellers more concerned about their environmental impact

Figure 24: Frequency of considering the environmental impact in decision-making, by location, 2021

ENVIRONMENTALLY FRIENDLY BEHAVIOUR DRIVERS

Protecting the planet proves top eco driver...

Figure 25: Reasons for considering the environmental impact when decision-making, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- ...underlining further opportunities to engage with consumers about corporate sustainability measures
- Consumers consider the environmental impact of food waste...

Figure 26: Proportion of adults who say they consider the environmental impact of their actions to avoid food waste, by age, 2021

· ...and its societal implications

ENVIRONMENTALLY FRIENDLY HABITS

 Older consumers stick to a more traditional approach to being sustainable

Figure 27: Frequency of selected ethical behaviours, 2021

· Rise of trendy green behaviours

Figure 28: Frequency of selected ethical behaviours, by age – NET all the time and most of the time, 2021

Plastic-free stores less widely available in rural areas

Figure 29: Frequency of going to plastic-free stores, by location of household, 2021

 Second-hand clothing sees a boom in popularity with younger consumers

Figure 30: Frequency of buying clothes/accessories second-hand, by age within gender, 2021

• Electric cars increase in popularity

Figure 31: Frequency of driving hybrid/electric cars, 2018 vs

 Technology becomes important in helping consumers reduce eco impact

Figure 32: Frequency of usage of technology designed to help minimise carbon footprint, by age, 2021

ETHICAL ATTITUDES

Ethical brands garner strong appeal...

Figure 33: Selected attitudes towards ethical business behaviours, 2021

- ...but as expectations grow, so does the need for transparency
- Smaller businesses perceived as more ethical than larger brands

Figure 34: Selected attitudes towards ethical business behaviours, 2021

 Tech brands can do more to engage consumers on green credentials

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



COVID-19 raises awareness of the need for greener travel

WHAT MAKES A COMPANY ETHICAL

- Environmental efforts and social welfare both important
 Figure 35: How consumers define what makes a brand or company ethical, 2021
- Consumers consider financial behaviour an ethical issue
 Figure 36: How consumers define what makes a brand or company ethical selected factors, by age, 2021
- **Fighting social issues most important to younger audiences**Figure 37: Proportion of adults who consider brands that help
 fight social issues to be ethical, by age within gender,2021
- Financially responsible behaviour key to an ethical reputation

ETHICAL BUYING CONSIDERATIONS

- Consumers most ethical when buying FMCG
 Figure 38: Consideration of how ethical a sector is before purchasing,2021
- · Food and drink top the ethical consideration list
- Opportunity for ethical fashion certification
 Figure 39: Consideration of how ethical the clothing sector is before purchasing, by age, 2021
- Consumers display a lower interest in ethics when it comes to financial services

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.