Behaviour Insights: Wave 11 Impact Survey

GREATER MANCHESTER
DOING THINGS DIFFERENTLY FOR THE ENVIRONMENT

Item 10

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SUSTAINABILITY STUDY REPORT
WAVE 11

Prepared for **GMCA**
Prepared by **Impact**

19th December 2024

GMCA GREATER MANCHESTER COMBINED AUTHORITY

IMPACT
FROM INSIGHT TO INFLUENCE

SUSTAINABILITY SEGMENTATION

IMPACT

FROM INSIGHT TO INFLUENCE

SUSTAINABILITY SEGMENTS ‘PLANET’

We have recently developed a segmentation based on attitudes towards the environment and climate change. We have identified 6 segments:

Passionate Advocates

Eco-Followers

Traditional Habitualists

Ambivalent Savers

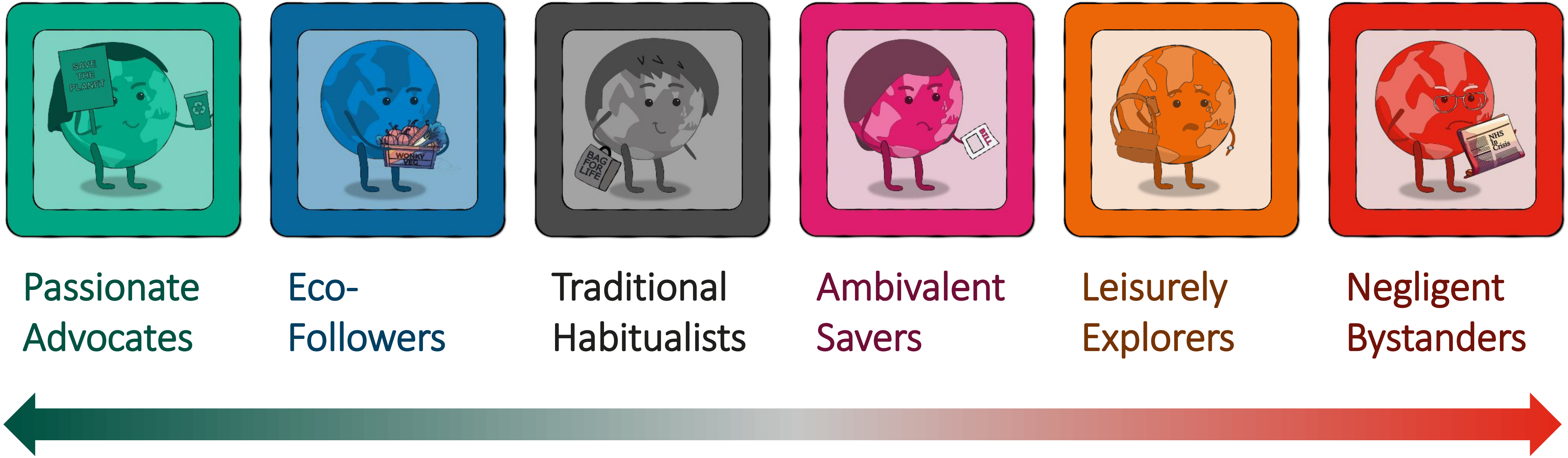
Leisurely Explorers

Negligent Bystanders

Video Introduction: https://vimeo.com/1032258820

SUSTAINABILITY SEGMENTS

Our sustainability segments can be ordered based on their levels of engagement in sustainability.
While Leisurely Explorers have positive attitudes towards sustainability and tackling climate change, it doesn’t follow through into behaviours, which is why they fall towards the lower end of the scale.



Passionate Advocates

Eco-Followers

Traditional Habitualists

Ambivalent Savers

Leisurely Explorers

Negligent Bystanders

Most sustainable

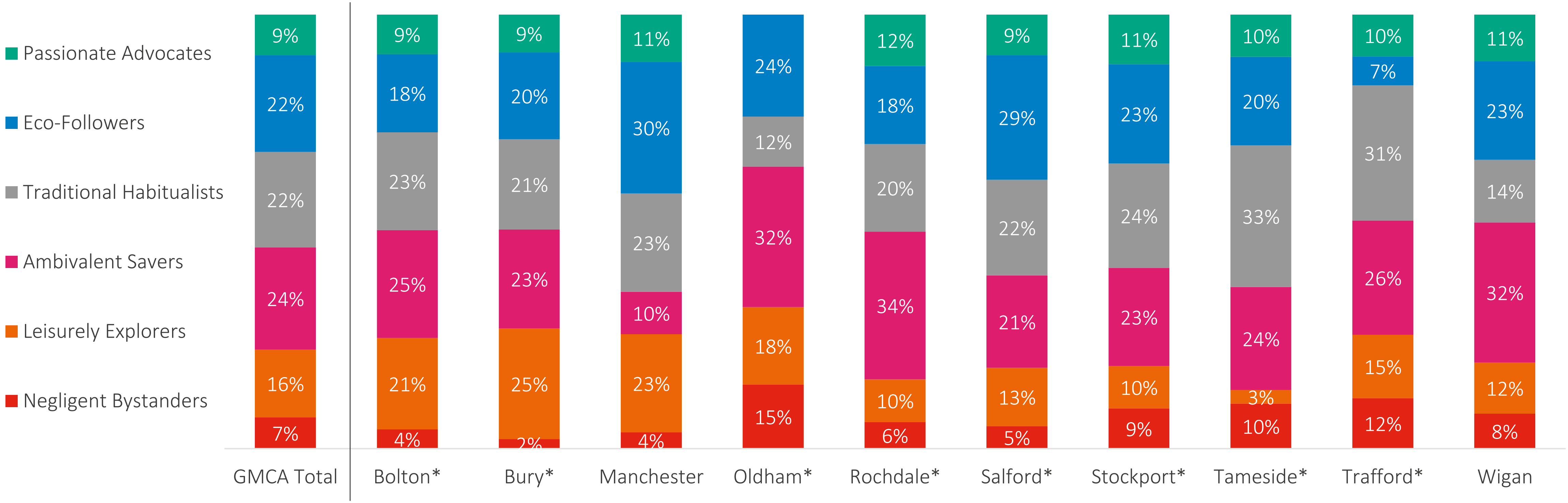
Least sustainable

Base size under n=50

PLANET SEGMENTS IN GMCA REGIONS

Manchester and Salford have a greater population of sustainable segments. Traditional Habitualists are more likely to be in Tameside, while Ambivalent Savers are more likely to be in Oldham, Rochdale and Wigan. Oldham is also less likely to have the most sustainable segment, Passionate Advocates.

PLANET Segments within each region of GMCA



Base size – Oct 24: GMCA Total: 505; Bolton: 40; Bury: 42; Manchester: 136; Oldham: 41; Rochdale: 34; Salford: 49; Stockport: 38; Tameside: 39; Trafford: 35; Wigan: 51
Weighted

‘PLANET’ SEGMENTS BREAKDOWN – GMCA

This is how the PLANET segments fall out in terms of demographics among the GMCA sample:

	Passionate advocates	Eco-followers	Traditional Habitualists	Ambivalent Savers	Leisurely Explorers	Negligent Bystanders
Male	52%	49%	48%	43%	51%	59%
Female	48%	50%	52%	57%	49%	41%
16-24	7%	14%	9%	12%	23%	5%
25-34	13%	27%	12%	14%	25%	12%
35-44	16%	16%	15%	18%	22%	30%
45-54	21%	15%	24%	17%	12%	14%
55-64	24%	10%	16%	16%	8%	21%
65+	19%	18%	25%	22%	9%	18%

Base: 505
Weighted

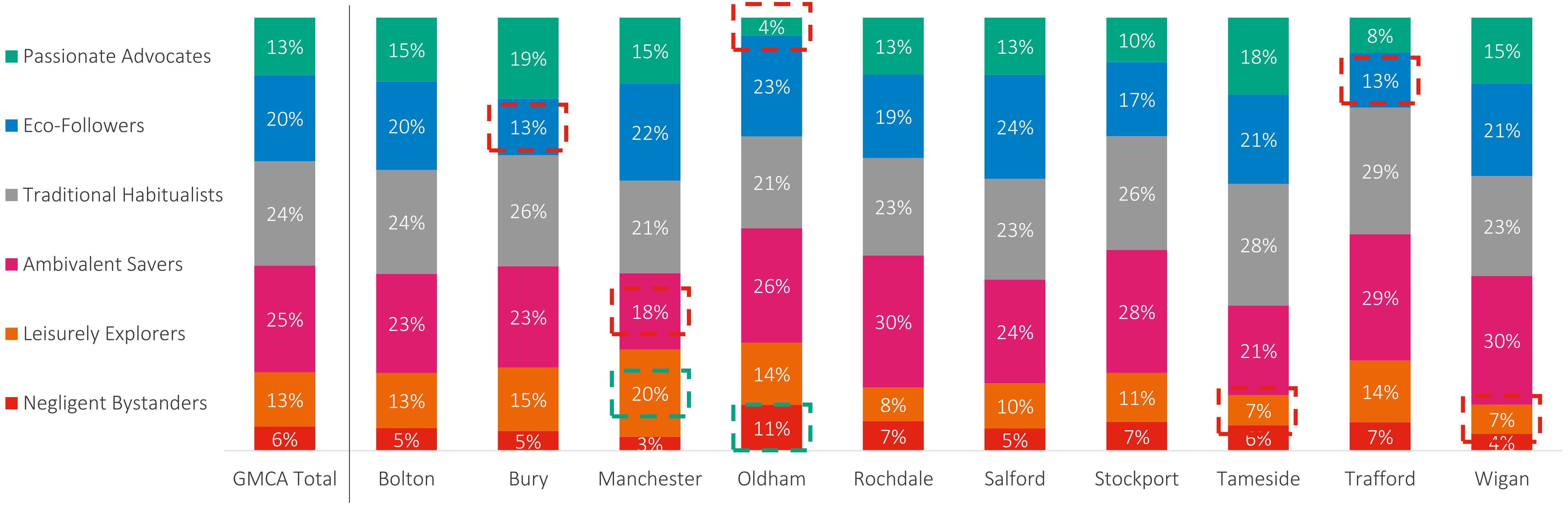
Significantly lower than GMCA total

Significantly higher than GMCA total

PLANET SEGMENTS IN GMCA REGIONS

Oldham is less likely to have Passionate Advocates, but instead more likely to have Negligent Bystanders. While Manchester has more Leisurely Explorers, Tameside and Wigan are less likely to have residents that fall into that segment.

PLANET Segments within each region of GMCA – Waves 9-11



Base size – Oct 23-24: GMCA Total: 1579; Bolton: 144; Bury: 142; Manchester: 393; Oldham: 122; Rochdale: 110; Salford: 178; Stockport: 130; Tameside: 117; Trafford: 105; Wigan: 138
Weighted

IMPORTANCE OF SUSTAINABILITY IN DAY-TO-DAY LIFE

FROM INSIGHT TO INFLUENCE

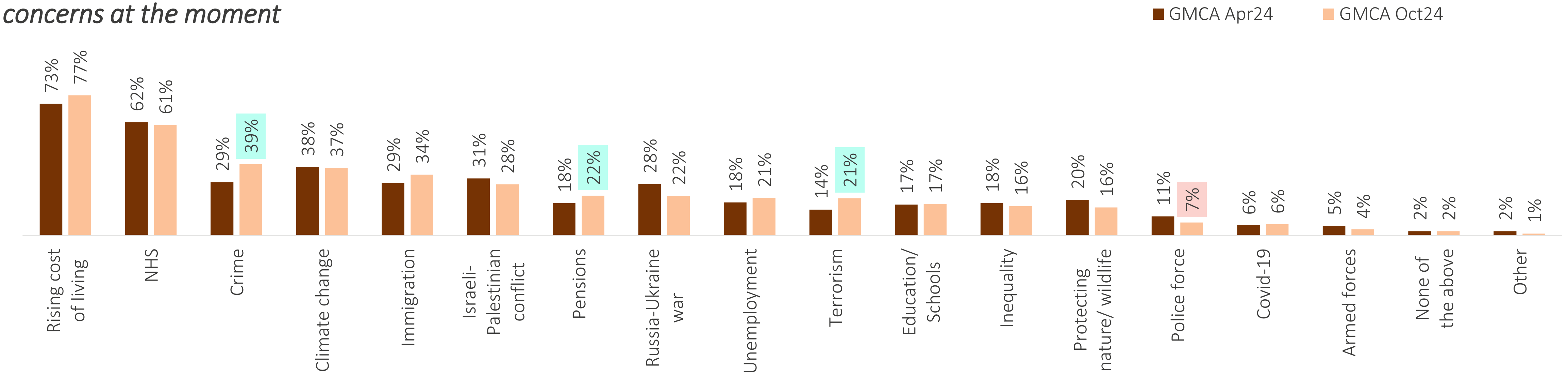
🟩 *Oct24 sig. higher than Apr24*

🟥 *Oct24 sig. lower than Apr24*

AREAS OF CONCERN

The primary area of concern is the rising cost of living, with 3 in 4 saying this concerns them. Concerns around crime and terrorism have increased significantly among GMCA residents, something which hasn’t been completely reflected in the wider UK population.

Top concerns at the moment



Nat Rep Apr-24	74%	64%	29%	41%	36%	32%	15%	33%	15%	16%	13%	15%	25%	8%	5%	5%	1%	2%
Nat Rep Oct-24	75%	61%	33%	40%	39%	31%	20%	28%	18%	18%	16%	18%	21%	7%	8%	4%	1%	2%

65+ GMCA: Sig. lower Rising cost of living (64%) and unemployment (2%).

25-34 GMCA: Sig. higher climate change (53%) unemployment (38%).

Males GMCA: Sig. lower education/ schools (12%).

Manchester GMCA: Sig. higher climate change (50%).

SEG A GMCA: Sig. higher climate change (62%) and protecting nature (31%).

New code added (Israel-Palestinian conflict) – tracking started from scratch

Z10: Which of the following are you most concerned about at the moment? Oct 23 Base: Nat rep: 2,951, GMCA: 610, APr24 Base: Nat rep: 2,017, GMCA: 570; Oct 24 Base: Nat rep: 2,005, GMCA: 549

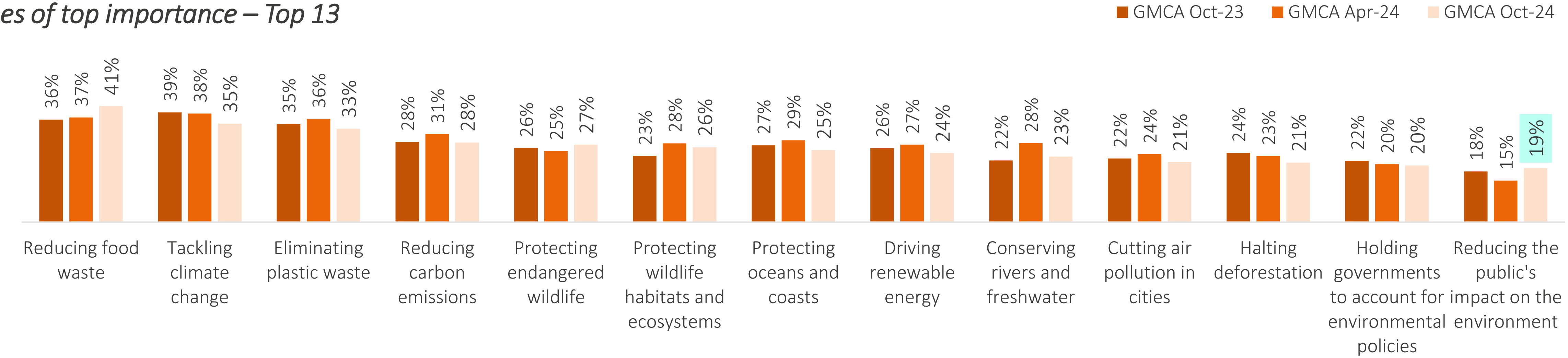
🟩 *Oct24 sig. higher than Apr24*

🟥 *Oct24 sig. lower than Apr24*

GLOBAL ENVIRONMENTAL ISSUES – TOP IMPORTANCE (TOP 13)

Reducing food waste is now the priority amongst both GMCA residents and the wider country, having overtaken tackling climate change this wave.

Issues of top importance – Top 13



Nat Rep Oct-23	35%	44%	37%	28%	34%	29%	34%	26%	25%	20%	33%	19%	17%
Nat Rep Apr-24	36%	42%	37%	26%	31%	29%	31%	28%	25%	20%	27%	16%	15%
Nat Rep Oct-24	39%	38%	36%	27%	30%	31%	32%	27%	25%	21%	28%	18%	18%

Females GMCA: Sig. higher for reducing food waste (47%).

65+ GMCA: Sig. higher conserving rivers and fresh water (37%) and halting deforestation (35%).

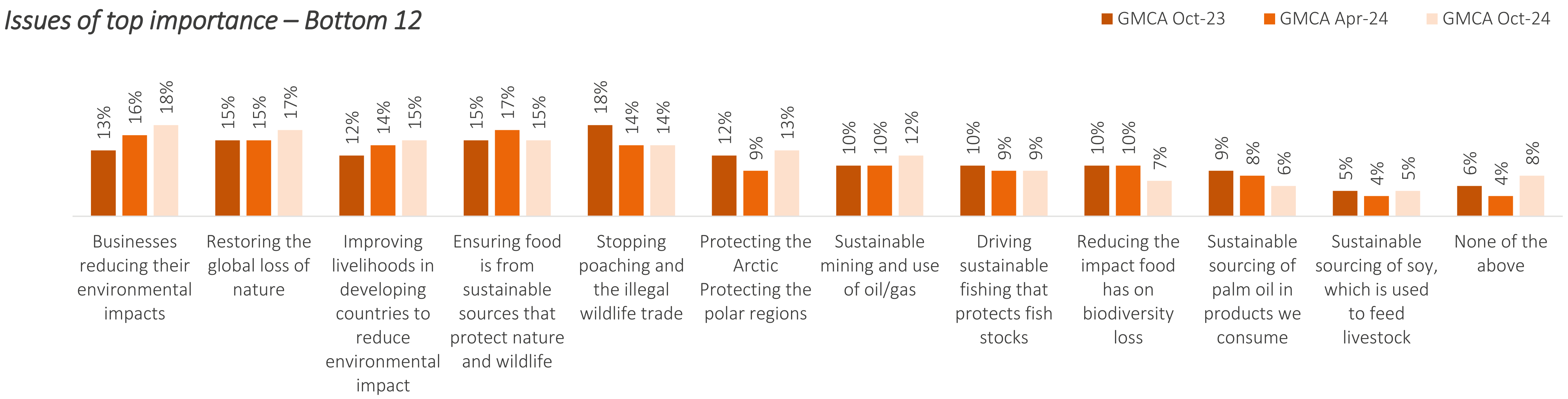
Z12: Which, if any, of the following global environmental issues are most important to you? You may select up to 6 statements. Base: Oct23: Nat Rep: 2,951, GMCA: 610, APr24 Base: Nat rep: 2,017, GMCA: 570, Oct 24 Base: Nat rep: 2,005, GMCA: 549

🟩 *Oct24 sig. higher than Apr24*

🟥 *Oct24 sig. lower than Apr24*

GLOBAL ENVIRONMENTAL ISSUES – TOP IMPORTANCE (BOTTOM 12)

GMCA residents this wave appear to be more interested in businesses reducing their environmental impact than the wider UK sample.


Issues of top importance – Bottom 12

	Businesses reducing their environmental impacts	Restoring the global loss of nature	Improving livelihoods in developing countries to reduce environmental impact	Ensuring food is from sustainable sources that protect nature and wildlife	Stopping poaching and the illegal wildlife trade	Protecting the Arctic Protecting the polar regions	Sustainable mining and use of oil/gas	Driving sustainable fishing that protects fish stocks	Reducing the impact food has on biodiversity loss	Sustainable sourcing of palm oil in products we consume	Sustainable sourcing of soy, which is used to feed livestock	None of the above
Nat Rep Oct23	13%	20%	11%	17%	17%	15%	10%	11%	10%	10%	3%	2%
Nat Rep Apr24	13%	16%	11%	17%	16%	12%	9%	9%	8%	8%	5%	3%
Nat Rep Oct24	13%	20%	12%	14%	19%	15%	10%	10%	8%	5%	5%	4%

Z12: Which, if any, of the following global environmental issues are most important to you? You may select up to 6 statements. Base: Oct23: Nat Rep: 2,951, GMCA: 610, APr24 Base: Nat rep: 2,017, GMCA: 570, Oct 24 Base: Nat rep: 2,005, GMCA: 549

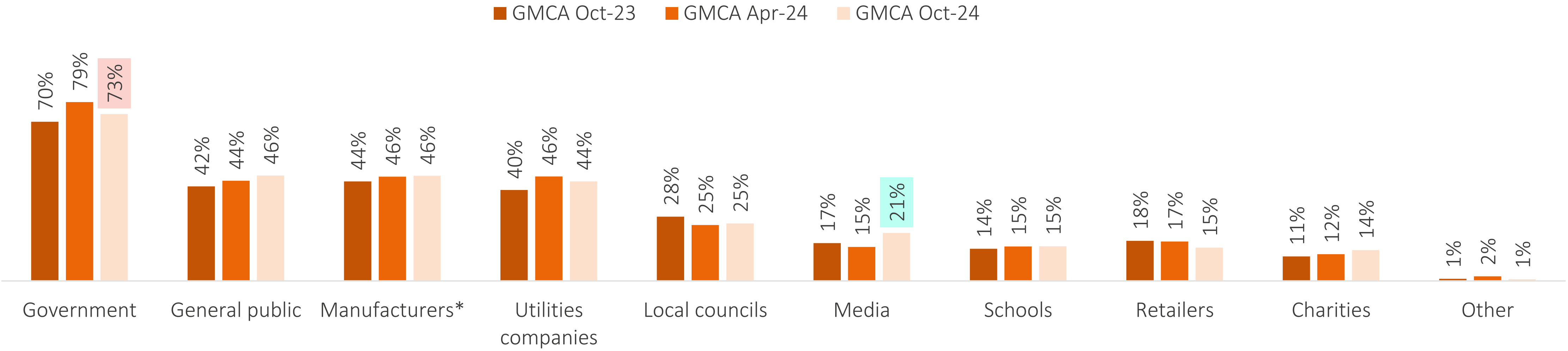
🟩 *Oct24 sig. higher than Apr24*

🟥 *Oct24 sig. lower than Apr24*

IMPORTANCE FOR TACKLING CLIMATE CHANGE - PROMPTED

The Government is deemed most important for tackling climate change, consistent across GMCA and the UK, although this has dipped slightly this wave. GMCA residents are more likely to place importance on the media and less importance on manufacturers.

Responsibility for tackling climate change - % Ranked Top 3



	Government	General public	Manufacturers*	Utilities companies	Local councils	Media	Schools	Retailers	Charities	Other
Nat Rep Oct-23	74%	44%	55%	43%	21%	22%	11%	22%	13%	1%
Nat Rep Apr-24	78%	45%	54%	45%	20%	15%	9%	19%	13%	2%
Nat Rep Oct-24	75%	43%	54%	45%	23%	17%	11%	18%	13%	1%

16-24 GMCA: Sig. lower for utilities companies (22%)

25-34 GMCA: Sig. higher for general public (63%) and media (35%)

**Manufacturers figures in all waves are sig lower for GMCA compared to Nat Rep*

D3: Which of the following, if any, are most important in helping to tackle climate change? Base: Oct23: Nat Rep: 2,951, GMCA: 647, APr24 Base: Nat rep: 2,017, GMCA: 570 , Oct 24 Base: Nat rep: 2,005, GMCA: 549

CONSUMER BEHAVIOURS

IMPACT

FROM INSIGHT TO INFLUENCE

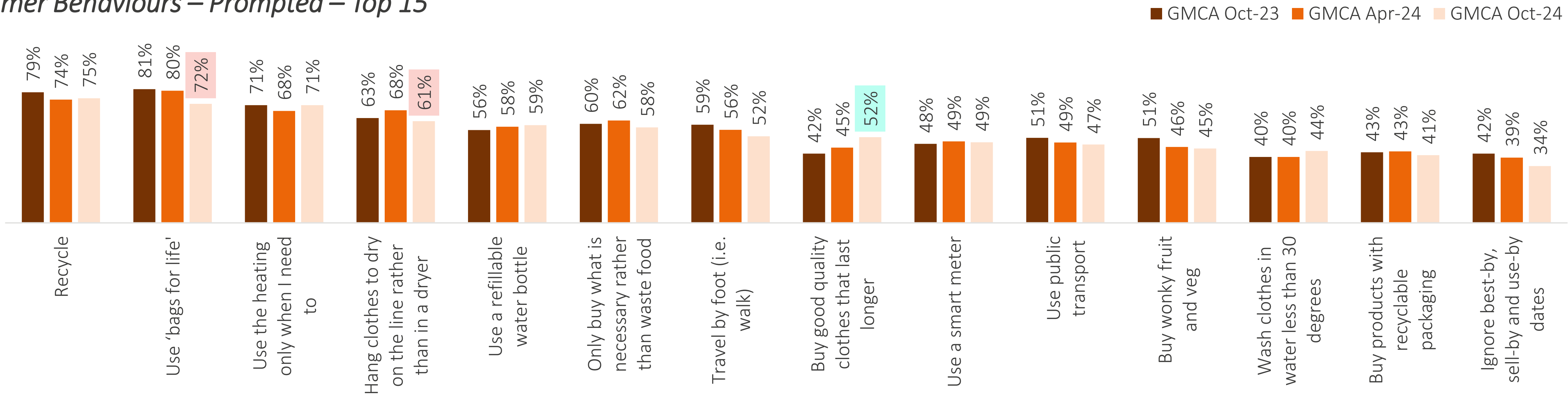
🟩 *Oct-24 sig. higher than Apr-24*

🟥 *Oct-24 sig. lower than Apr-24*

CONSUMER BEHAVIOURS – TOP 14

Recycling and using bags for life are the most common behaviours in the GMCA region and the UK in general, although the latter has decreased this wave amongst GMCA residents.

Consumer Behaviours – Prompted – Top 15



Nat Rep Oct-23	82%	80%	72%	67%	60%	63%	62%	48%	45%	47%	57%	41%	55%	47%
Nat Rep Apr-24	79%	78%	69%	66%	54%	63%	57%	43%	47%	47%	50%	41%	49%	40%
Nat Rep Oct-24	80%	76%	69%	64%	56%	63%	57%	45%	46%	48%	44%	42%	44%	38%

Females GMCA: Sig. higher for use bags for life (79%), only buy what is necessary (66%), Buy wonky fruit and veg (55%), Wash clothes in water less than 30 degrees (52%).

65+ GMCA: Sig. higher for use bags for life (87%), only use heating when need to (84%), hang clothes to dry (75%), only buy what is necessary (72%).

Manchester GMCA: Sig. lower for use bags for life (51%), only use heating when need to (62%), use smart meter (34%), Ignore best-by, sell-by and use-by dates (23%).

SEG A GMCA: Sig. lower for use bags for life (34%), travel by foot (37%), buy wonky fruit and veg (26%), Ignore best-by, sell-by and use-by dates (14%).

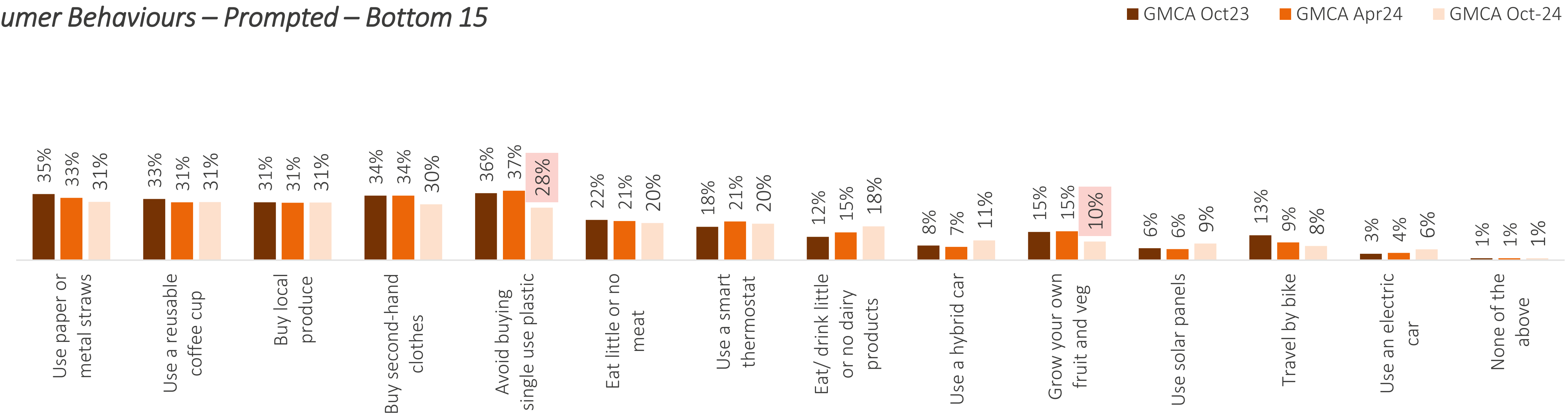
C8: Which of the following, if any, do you do? Base: Oct23: Nat Rep: 2,951, GMCA: 610, Base Apr24: Nat Rep: 2,017, GMCA: 570 ; Oct-24 Base: Nat rep: 2,005 GMCA: 549

🟦 *Oct-24 sig. higher than Apr-24*
🟥 *Oct-24 sig. lower than Apr-24*

CONSUMER BEHAVIOURS – BOTTOM 14

Of the 14 least common behaviours, avoiding buying single use plastic and growing own fruit and veg have significantly decreased this wave.

Consumer Behaviours – Prompted – Bottom 15



	Use paper or metal straws	Use a reusable coffee cup	Buy local produce	Buy second-hand clothes	Avoid buying single use plastic	Eat little or no meat	Use a smart thermostat	Eat/ drink little or no dairy products	Use a hybrid car	Grow your own fruit and veg	Use solar panels	Travel by bike	Use an electric car	None of the above
Nat Rep Oct-23	38%	34%	43%	35%	41%	28%	17%	15%	8%	23%	9%	14%	5%	0%
Nat Rep Apr-24	31%	27%	34%	31%	35%	22%	17%	15%	9%	19%	9%	11%	3%	1%
Nat Rep Oct-24	30%	30%	34%	35%	33%	20%	15%	14%	9%	18%	9%	12%	5%	1%

Females GMCA: Sig. higher for buying second-hand clothes (42%), use paper/ metal straws (40%).

35-49 GMCA: Sig. higher for use reusable coffee cup (44%)

50-64 GMCA: Sig. lower eat/drink little or no dairy (11%), use an electric car (1%), use solar panels (4%).

SEG A GMCA: Sig. higher for use a hybrid car (36%), use solar panels (36%), use electric car (23%); sig lower for buy second-hand clothes (6%).

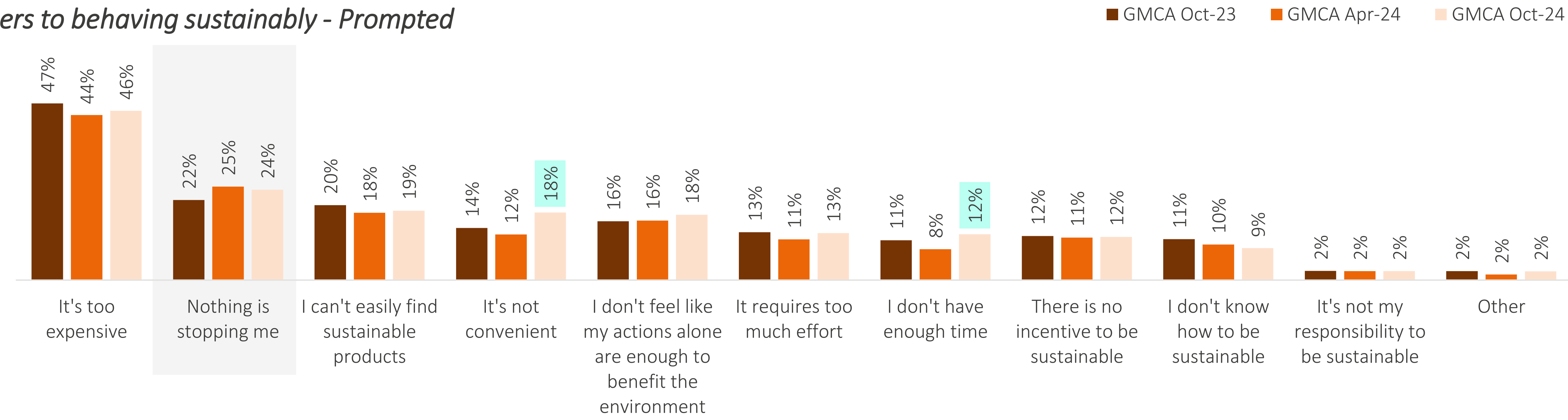
C8: Which of the following, if any, do you do? Base: Oct23: Nat Rep: 2,951, GMCA: 610, Base Apr24: Nat Rep: 2,017, GMCA: 570 ; Oct-24 Base: Nat rep: 2,005 GMCA: 549

🟩 *Oct24 sig. higher than Apr24*

BARRIERS TO BEHAVING SUSTAINABLY

The main barrier is the cost of being sustainable, with 2 in 5 consumers perceiving sustainable behaviours to be expensive. While a quarter feel nothing is stopping them, there have been significant increases this wave in the numbers of residents who find it too inconvenient or don’t have the time.

Barriers to behaving sustainably - Prompted



Nat Rep Oct-23	48%	24%	19%	14%	14%	12%	10%	11%	10%	3%	3%
Nat Rep Apr-24	45%	27%	18%	15%	13%	13%	10%	10%	9%	3%	3%
Nat Rep Oct-24	45%	26%	17%	16%	15%	13%	11%	12%	9%	3%	2%

16-24 GMCA: Sig. higher for too expensive (60%), insufficient time (22%); sig. lower for nothing is stopping me (6%).

65+ GMCA: Sig. higher for nothing is stopping me (34%); sig. lower for too expensive (29%), not convenient (7%), insufficient time (4%).

£10,000 - £24,999 / SEG E GMCA: Sig. higher for I don't know how to be sustainable (17% / 18%).

TES3: What, if anything, is stopping you from being more sustainable? Base: Oct23: Nat Rep: 2,951, GMCA: 610, Base Apr24: Nat Rep: 2,017, GMCA: 570 ; Oct-24 Base: Nat rep: 2,005 GMCA: 549

X% *Directionally higher than GMCA total sample*

X% *Directionally lower than GMCA total sample*

🟩 *Significantly higher than GMCA total sample*

🟥 *Significantly lower than GMCA total sample*

**Low base size warning*

BARRIERS - SEGMENTS

Column %	Total Nat Rep Sample	GMCA Total Sample	Passionate Advocates (GMCA)	Eco-Followers (GMCA)	Traditional Habitualists (GMCA)	Ambivalent Savers (GMCA)	Leisurely Explorers (GMCA)	Negligent Bystanders* (GMCA)
It's too expensive	45%	46%	25%	38%	43%	61%	44%	71%
Nothing is stopping me	26%	24%	59%	28%	27%	11%	19%	17%
I can't easily find sustainable products	17%	19%	19%	30%	18%	16%	10%	2%
It's not convenient	16%	18%	10%	19%	11%	20%	20%	43%
I don't feel like my actions alone are enough to benefit the environment	15%	18%	4%	13%	16%	18%	20%	36%
It requires too much effort	13%	13%	0%	15%	5%	13%	19%	24%
There is no incentive to be sustainable	12%	12%	7%	10%	4%	15%	16%	23%
I don't have enough time	11%	12%	0%	13%	12%	9%	18%	27%
I don't know how to be sustainable	9%	9%	0%	6%	7%	12%	10%	10%
It's not my responsibility to be sustainable	3%	2%	0%	1%	2%	2%	2%	14%
Other	2%	2%	3%	2%	2%	4%	0%	6%

TES3: What, if anything, is stopping you from being more sustainable? Base: Nat rep: 2,005, GMCA: 549, GMCA Passionate Advocates: 53, GMCA Eco-Followers: 119, GMCA Traditional Habitualists: 112, GMCA Ambivalent Savers: 113, GMCA Leisurely Explorers: 74, GMCA Negligent Bystanders: 34

INFORMATION

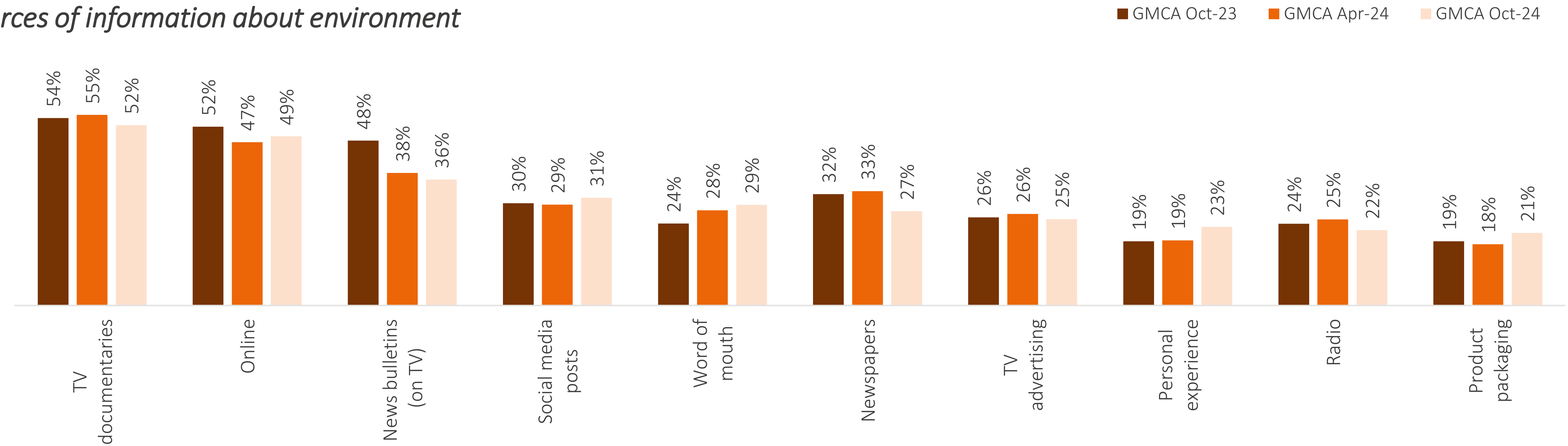
FROM INSIGHT TO INFLUENCE

Oct24 sig. higher than Apr24

SOURCES OF INFORMATION (TOP 10)

While TV documentaries, online channels and news bulletins continue to be used most in both the GMCA region and the UK, social media posts are gaining prominence amongst certain groups including those under 34, those earning over £100k a year and those in the city of Manchester.

Sources of information about environment



Nat Rep Oct-23	58%	48%	47%	24%	29%	35%	26%	24%	25%	26%
Nat Rep Apr-24	51%	42%	43%	24%	27%	30%	26%	18%	23%	18%
Nat Rep Oct-24	48%	48%	41%	28%	27%	29%	26%	19%	22%	19%

16-24 GMCA: Sig. higher for social media posts (53%).

25-34 GMCA: Sig. higher for online (69%), social media posts (53%).

65+ GMCA: Sig. higher for news bulletins (58%), TV docs. (65%), word of mouth (50%).

Manchester GMCA: Sig. higher for social media posts (44%), news apps (27%).

£100k+ PA income: Sig. higher for social media posts (46%), personal experience (36%).

D1. From where do/ did you find out about the environment and environmental issues? Base: Oct23: Nat Rep: 2,951, GMCA: 610, Base Apr24: Nat Rep: 2,017, GMCA: 570 ; Oct-24 Base: Nat rep: 2,005 GMCA: 549

ENERGY EFFICIENT TECHNOLOGY

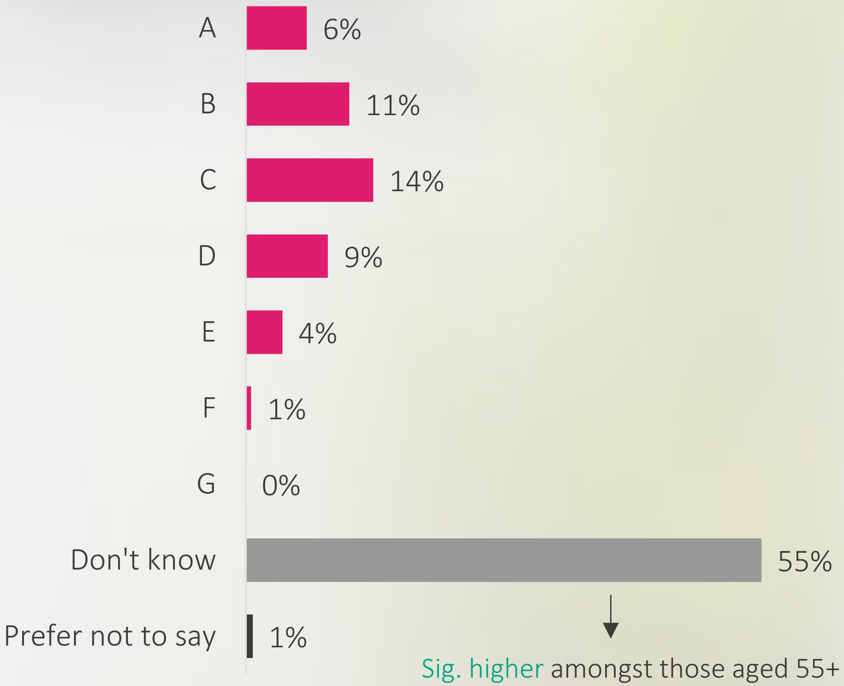
GMCA questions

IMPACT

FROM INSIGHT TO INFLUENCE

Over half of GMCA residents don’t know the EPC rating of their home.

Energy Performance Certificate (EPC) rating:



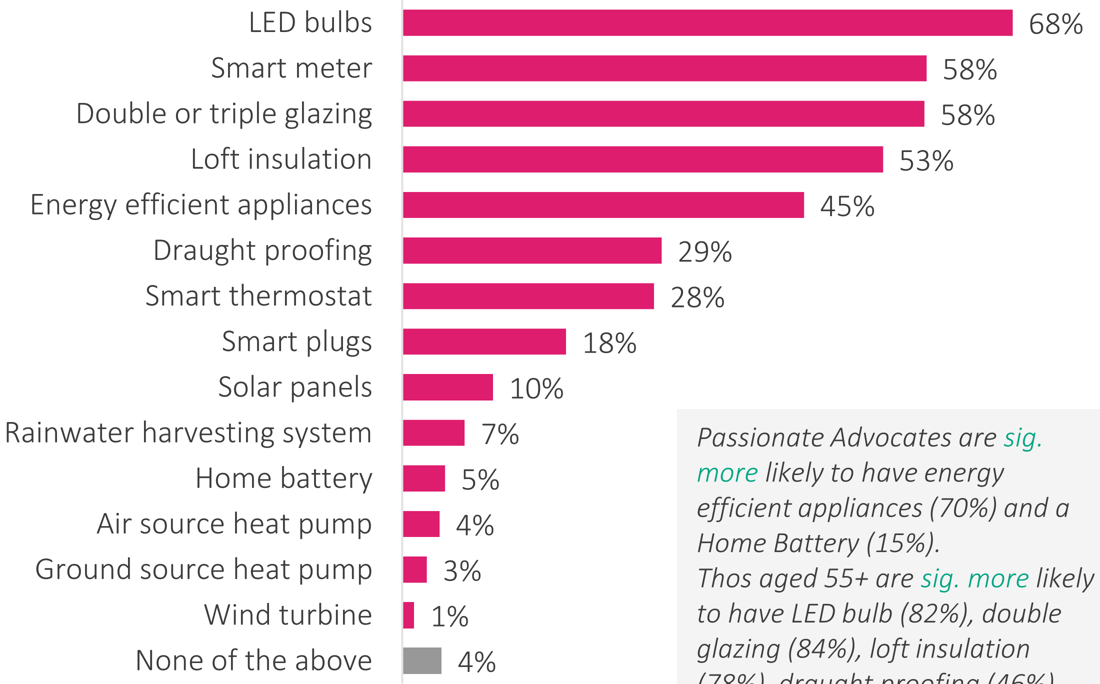
Sig. higher amongst those aged 55+ (73%)

GMCA18. What is the Energy Performance Certificate (EPC) rating of your home? Base size: 549

ENERGY EFFICIENT TECHNOLOGY – TOTAL SAMPLE

LED bulbs, smart meter and double/ triple glazing were the most common energy efficiency measures people currently have in their home. Consideration in the next 5 years was highest for smart meters and solar panels.

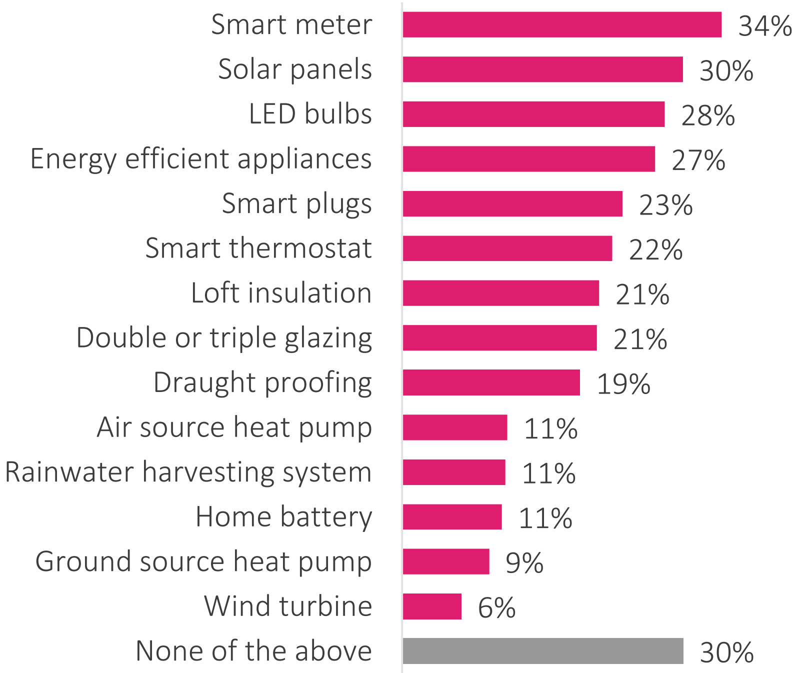
What GMCA residents have in their home:



Passionate Advocates are sig. more likely to have energy efficient appliances (70%) and a Home Battery (15%).
Thos aged 55+ are sig. more likely to have LED bulb (82%), double glazing (84%), loft insulation (78%), draught proofing (46%).

What GMCA residents would consider getting in the next 5 years:

Asked amongst those who don't already have it



GMCA19. Which of the following do you have in your home? Base size: 549
GMCA20. Which of the following would you consider getting/ installing in your home in the next 5 years? Base size: 172-547

ENERGY EFFICIENT TECHNOLOGY – CURRENTLY HAVE - **BY EPC RATING**

LED bulbs and smart meters were the most common, those with an EPC rating of A or B are more likely to have energy-efficient appliances and smart plugs.

Column %	Total	AB	C	DEFG	Don't know
LED bulbs	68%	71%	70%	64%	67%
Smart meter	58%	60%	60%	63%	56%
Double or triple glazing	58%	42%	62%	56%	63%
Loft insulation	53%	48%	56%	45%	56%
Energy efficient appliances	45%	60%	50%	37%	41%
Smart thermostat	28%	38%	31%	34%	22%
Draught proofing	29%	30%	40%	13%	29%
Smart plugs	18%	37%	19%	11%	14%
Solar panels	10%	27%	11%	9%	5%
Home battery	5%	13%	5%	8%	1%
Rainwater harvesting system	7%	11%	12%	6%	5%
Ground source heat pump	3%	8%	0%	5%	1%
Air source heat pump	4%	14%	5%	3%	1%
Wind turbine	1%	4%	2%	2%	0%
None of the above	4%	4%	1%	2%	6%

GMCA19. Which of the following do you have in your home? Base size: 549, AB: 102, C: 82, DEFG: 66, Don’t Know: 295

Low base size warning

ENERGY EFFICIENT TECHNOLOGY – CONSIDERATION - BY EPC RATING

Those who don’t know what their EPC rating is are more likely to say they would consider none of the above in the next 5 years.

Column %	Total	AB	C	DEFG	Don't know
Smart meter	34%	39%*	30%	44%*	31%
Solar panels	30%	43%	39%	45%	21%
LED bulbs	28%	28%*	38%*	24%*	26%
Energy efficient appliances	27%	28%*	35%*	34%*	24%
Smart plugs	23%	32%	31%	25%	19%
Smart thermostat	22%	18%	30%	32%*	20%
Loft insulation	21%	24%	30%*	20%*	18%
Double or triple glazing	21%	28%	26%*	32%*	13%
Draught proofing	19%	24%	13%*	22%	17%
Air source heat pump	11%	15%	14%	23%	7%
Rainwater harvesting system	11%	18%	12%	15%	8%
Home battery	11%	25%	11%	20%	5%
Ground source heat pump	9%	13%	12%	14%	6%
Wind turbine	6%	17%	5%	12%	2%
None of the above	30%	18%	22%	23%	37%

GMCA20. Which of the following would you consider getting/ installing in your home in the next 5 years? Base size: 172-547, AB: 39-95, C: 20-82, DEFG: 24-66, Don’t Know: 95-295

**Low base size warning*

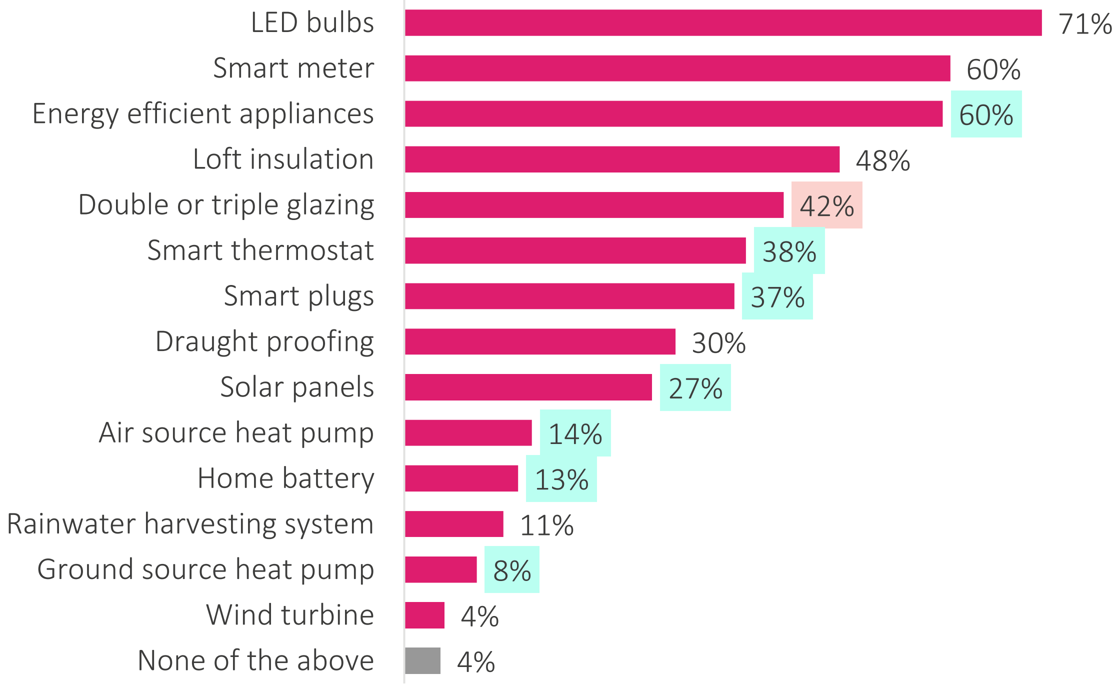
Sig. higher than total sample

Sig. lower than total sample

ENERGY EFFICIENT TECHNOLOGY – BY EPC RATING A OR B

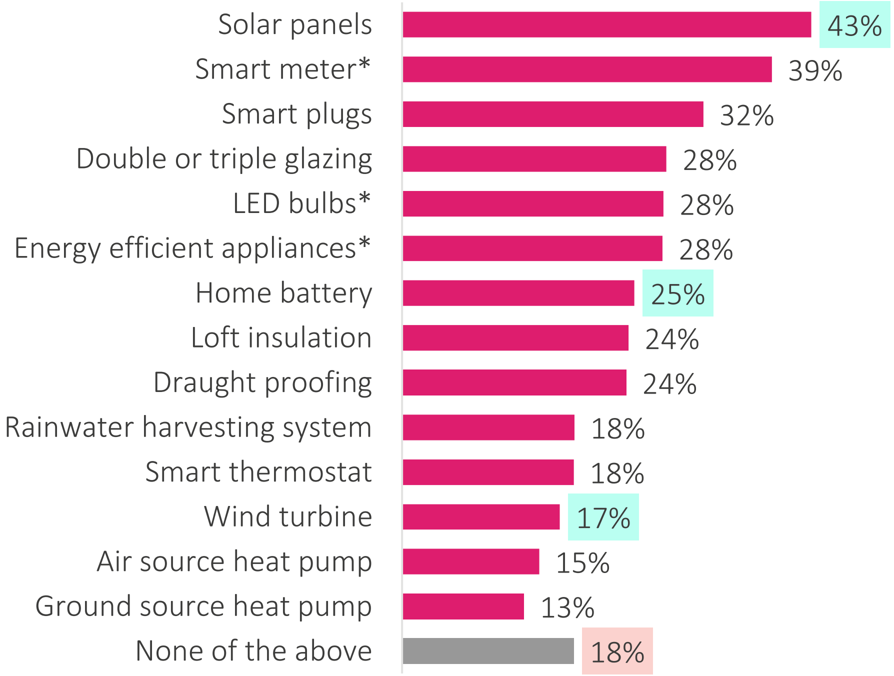
Those with an EPC rating of A or B are more likely to have different energy efficiency measures in their home, e.g. appliances, smart thermostats and smart plugs. They are also more likely to be considering getting/ installing other energy efficiency measures in the next 5 years.

What GMCA residents have in their home:



What GMCA residents would consider getting in the next 5 years:

Asked amongst those who don't already have it



GMCA19. Which of the following do you have in your home? Base size: 102

GMCA20. Which of the following would you consider getting/ installing in your home in the next 5 years? Base size: 31-95

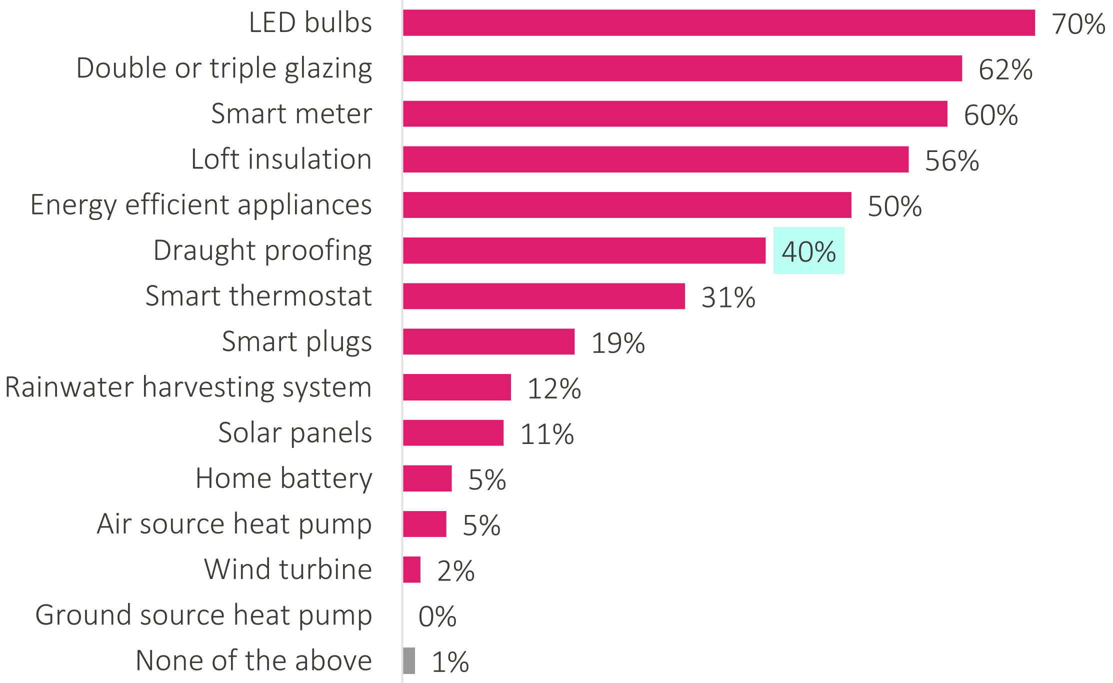
*Low base size warning

Sig. higher than total sample

ENERGY EFFICIENT TECHNOLOGY – BY EPC RATING C

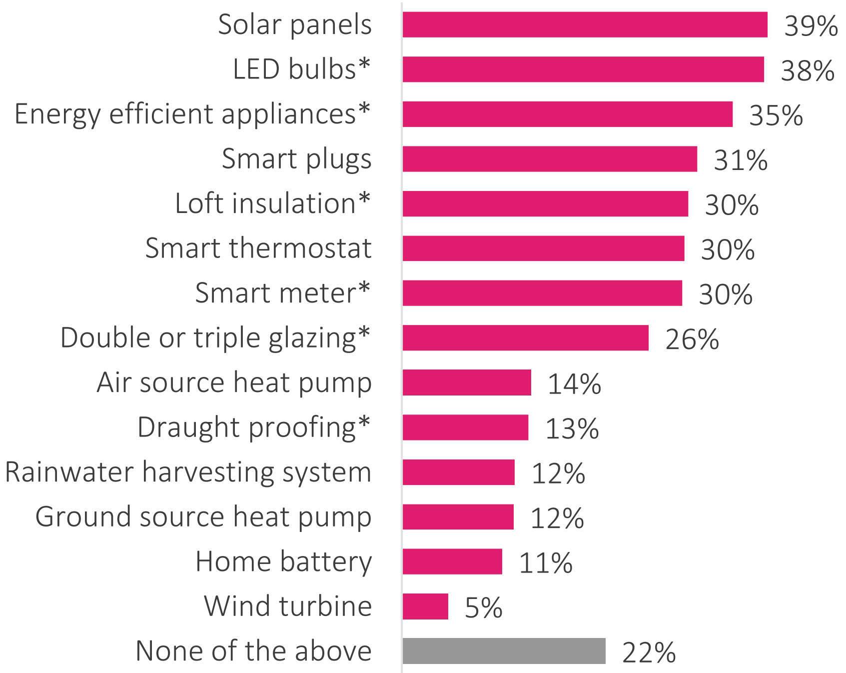
Those who have an EPC rating of C fall largely in line with the total sample.

What GMCA residents have in their home:



What GMCA residents would consider getting in the next 5 years:

Asked amongst those who don't already have it



GMCA19. Which of the following do you have in your home? Base size: 82
GMCA20. Which of the following would you consider getting/ installing in your home in the next 5 years? Base size: 20-82

*Low base size warning

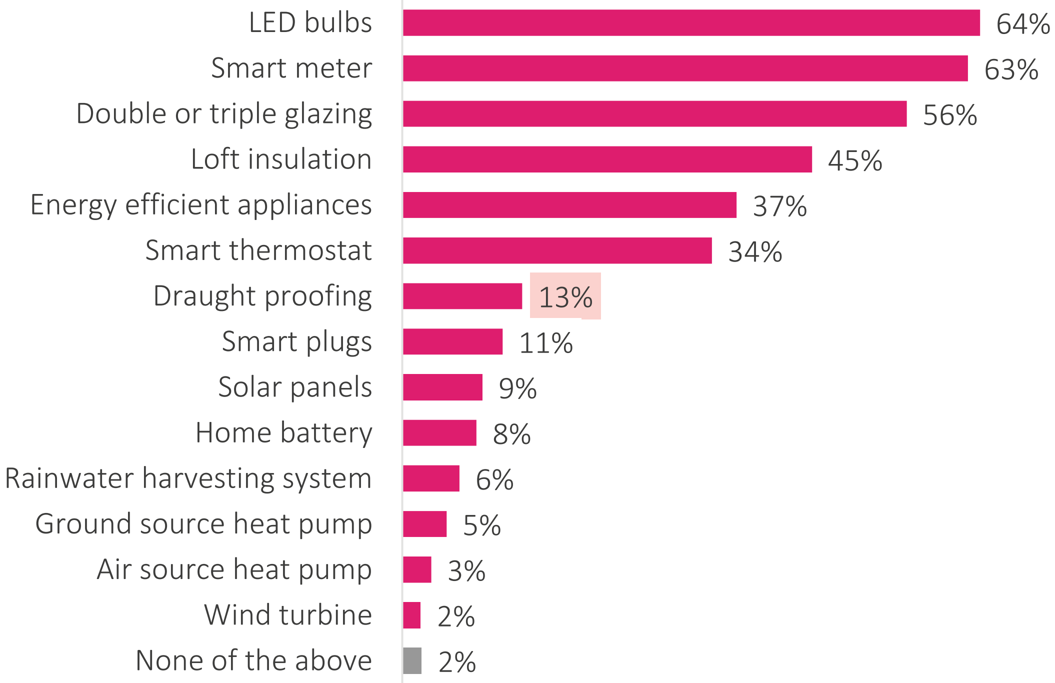
🟩 Sig. higher than total sample

🟥 Sig. lower than total sample

ENERGY EFFICIENT TECHNOLOGY – BY EPC RATING D OR BELOW

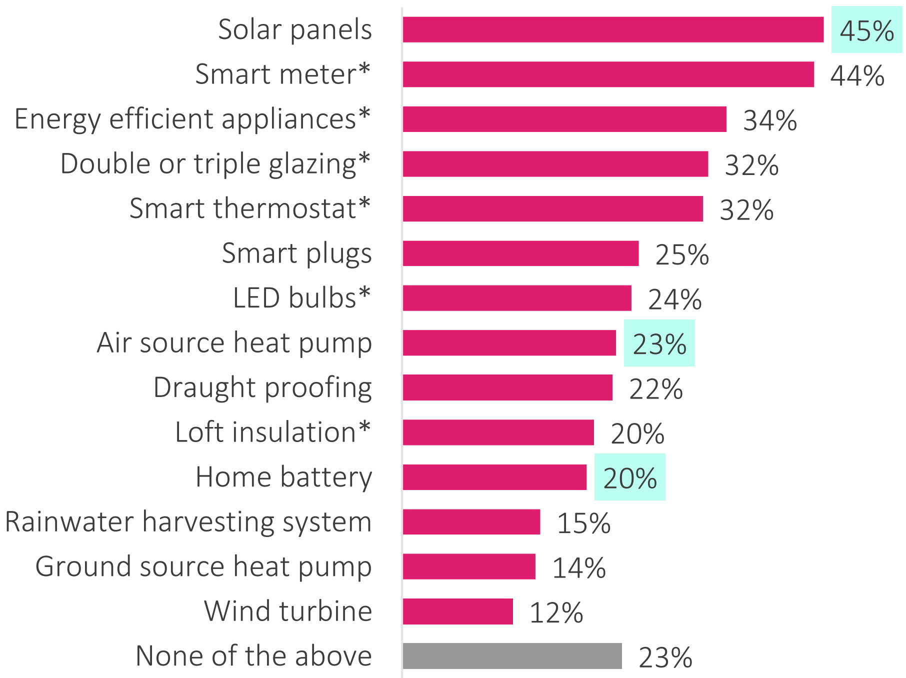
Those who have an EPC rating of D or below are more likely to be considering solar panels in the next 5 years.

What GMCA residents have in their home:



What GMCA residents would consider getting in the next 5 years:

Asked amongst those who don't already have it



GMCA19. Which of the following do you have in your home? Base size: 66
GMCA20. Which of the following would you consider getting/ installing in your home in the next 5 years? Base size: 24-66

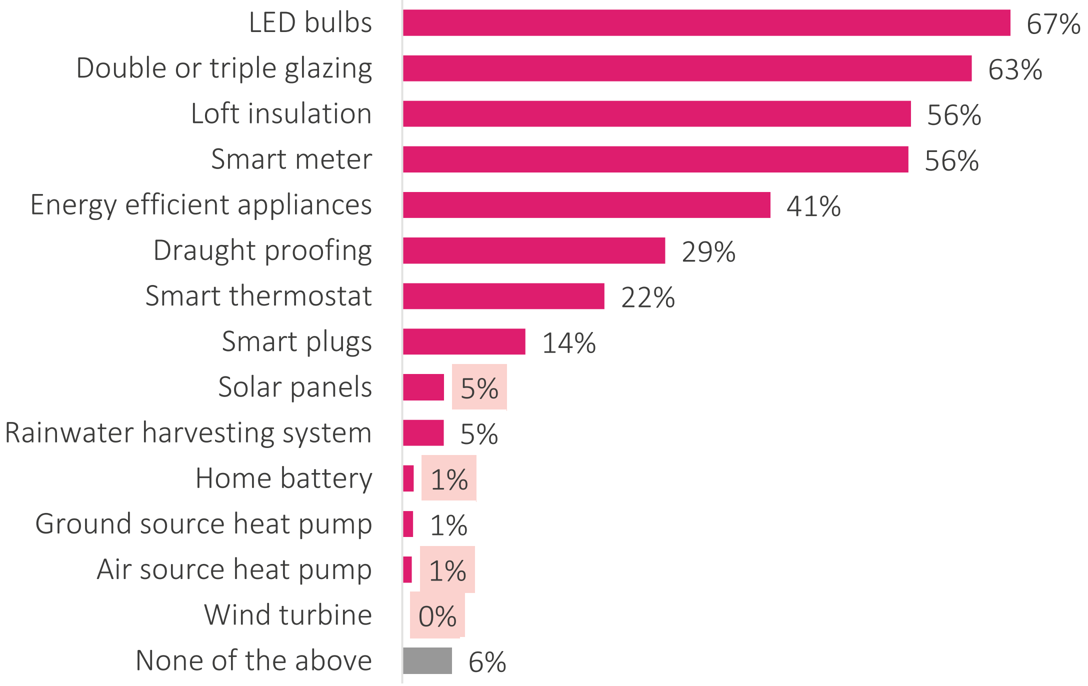
ENERGY EFFICIENT TECHNOLOGY – BY THOSE WHO DON'T KNOW THEIR EPC RATING

Sig. higher than total sample

Sig. lower than total sample

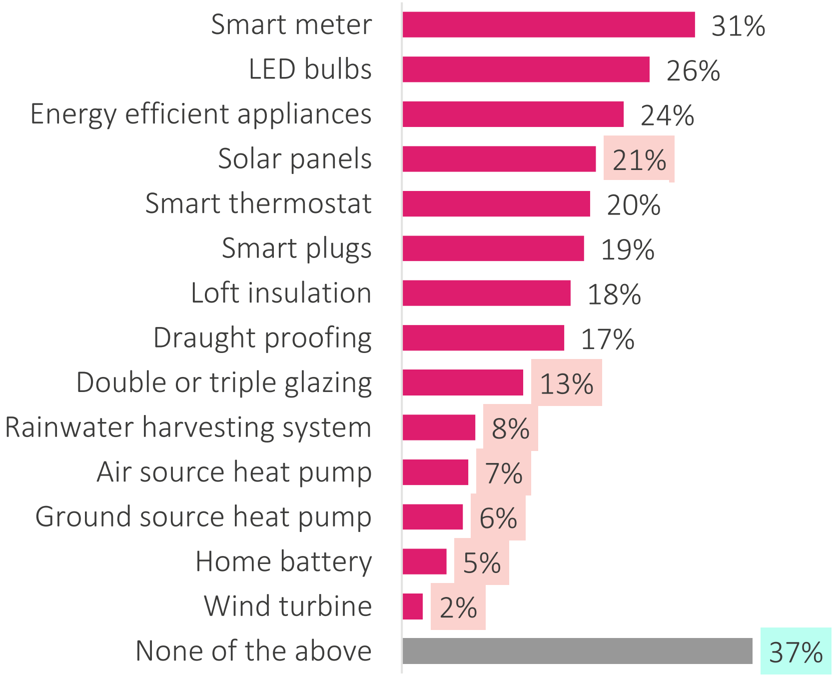
Those who don't know their EPC rating are less likely to be considering the energy efficiency measures in the next 5 years.

What GMCA residents have in their home:



What GMCA residents would consider getting in the next 5 years:

Asked amongst those who don't already have it



GMCA19. Which of the following do you have in your home? Base size: 295
GMCA20. Which of the following would you consider getting/ installing in your home in the next 5 years? Base size: 95-295

*Low base size warning

ENERGY EFFICIENT TECHNOLOGY OWNED VS WOULD CONSIDER GETTING

When considering residents with the seven most prevalent energy-efficient technologies, around a third would not consider getting any other technologies. For those who are open to getting further technologies, rainwater harvesting, smart meters and LED bulbs have the most appeal.

Column n range = # of residents who own technology in column who do not already own technology in row

Currently owned

Would consider getting

Column %	LED bulbs (n=140-375)	Smart meter (n=91-315)	Smart thermostat (n=32-156)	Smart plugs (n=28-103)	Double or triple glazing (n=71-306)	Loft insulation (n=63-281)	Draught proofing (n=24-160)	Air source heat pump (n=7-28)	Ground source heat pump (n=5-15)	Solar panels (n=12-65)	Home battery (n=8-31)	Energy efficient appliances (n=53-252)	Wind turbine (n=3-9)	Rainwater harvesting system (n=10-44)	None of the above (n=21)
LED bulbs		26%	30%*	40%*	31%	30%	32%*	60%*	89%*	42%*	48%*	34%	56%*	23%*	19%*
Smart meter	34%		41%	46%*	31%	34%	35%	50%*	49%*	53%*	59%*	35%	71%*	25%*	12%*
Smart thermostat	21%	23%		40%*	25%	22%	26%	25%*	19%*	20%*	27%*	25%	33%*	14%*	4%*
Smart plugs	26%	21%	29%		24%	22%	28%	39%*	6%*	23%*	22%*	31%	24%*	27%*	19%*
Double or triple glazing	23%	23%	27%	28%*		29%	37%*	42%*	59%*	42%*	47%*	33%	72%*	52%*	3%*
Loft insulation	24%	22%	29%	43%*	32%		25%*	56%*	34%*	49%*	51%*	32%	43%*	50%*	3%*
Draught proofing	21%	20%	23%	25%	24%	25%		37%*	44%*	37%*	36%*	28%	59%*	29%*	0%*
Air source heat pump	12%	13%	17%	15%	12%	10%	8%		46%*	27%*	56%*	13%	75%*	18%*	0%*
Ground source heat pump	10%	12%	17%	14%	8%	8%	9%	25%*		18%	17%*	10%	42%*	15%*	0%*
Solar panels	34%	34%	46%	38%	25%	29%	35%	60%*	37%*		68%*	33%	29%*	39%*	11%*
Home battery	12%	11%	17%	20%	7%	9%	7%	36%*	30%*	38%*		13%	0%*	12%*	0%*
Energy efficient appliances	26%	33%	37%	26%*	30%	27%	26%	55%*	44%*	50%*	62%*		57%*	56%*	15%*
Wind turbine	8%	8%	9%	14%	5%	5%	5%	32%*	47%*	15%	35%*	9%		4%*	0%*
Rainwater harvesting system	13%	11%	12%	18%	11%	11%	14%	33%*	39%*	23%	36%*	18%	69%*		9%*
None of the above	29%	30%	19%	20%	34%	32%	36%	6%*	7%*	11%	3%*	26%	0%*	30%*	51%*

GMCA19. Which of the following do you have in your home? Base size: 549
GMCA20. Which of the following would you consider getting/ installing in your home in the next 5 years? Base size: 172-547

SUMMARY

IMPACT

FROM INSIGHT TO INFLUENCE

SUMMARY (1)

Cost of living is still a concern, and a priority over sustainability…

Cost of living continues to be a major concern for GMCA residents, with 3 in 4 stating it as a top concern. **Around half said saving money was a priority over the environment**, consistent with last wave.

This suggests financial incentivisation (e.g. rewards, subsidies, or communicating the savings from doing certain behaviours) may still be the strongest driver of behaviour change, in line with the previous wave.

Although price is the primary barrier to acting sustainably, there is an increase this wave in **time constraints** and **inconvenience** being suggested by GMCA residents, as well as a large drop in people saying it is easy to be sustainable outside the home - suggesting some behaviours could also be changed through public infrastructure.

SUMMARY (2)

There is still a perception that supermarkets are most responsible for reducing food waste…

Supermarkets continue to be viewed as key players in reducing food waste. However, when presented with the statistics on the number of meals wasted in the Greater Manchester region, many were **shocked** and **felt that the general public should do more**. This highlights a key opportunity for GMCA to **engage and empower residents** by emphasising the important role individuals can play in tackling food waste.

Sources of information about sustainability…

Those under 35 report greater engagement with **social media**, whilst those over 55 engage more with **traditional media** such as **news bulletins** and **TV documentaries.** There is also a trend in which those in Manchester are more likely than other regions to be engaged with environmental issues and make lifestyle changes accordingly, which suggests campaigns should be multichannel to cover a variety of audiences across the whole of the GMCA area.

Local councils remain important, with 1 in 4 ranking them within their top 3 most important for sustainability and 7 in 10 citing them as an influence on their environmental views.

SUMMARY (3)

The future of travel methods…

When it comes to forms of travel used for short journey, in the last year people are walking, cycling and using the bus more frequently.

For next vehicle purchases, petrol cars continue to be the most considered (around 1 in 2), but around 1 in 3 would consider an electric or a hybrid. **Cost is the primary barrier to purchasing these vehicle types**, but 1 in 3 also expressed concerns about public charging availability, which could provide an **opportunity for investment or messaging to help ease these concerns.**

Residents are considering making energy efficient changes to their home…

Over half of residents in the Greater Manchester Combined Authority (GMCA) region are unaware of the Energy Performance Certificate (EPC) rating of their homes. This lack of awareness emphasizes the need for **greater education and communication** about the role EPC ratings play in helping residents understand and improve their home's energy performance.

Looking ahead, the most commonly considered energy efficiency improvements for the next five years include the installation of smart meters and solar panels. This indicates a growing interest in adopting more **advanced and sustainable solutions to lower energy bills and reduce carbon footprints.** GMCA could focus on **promoting the benefits of solar panels and smart meters, while providing practical guidance and support** to make these technologies more accessible to residents.

Recommendation:

To note the presentation.