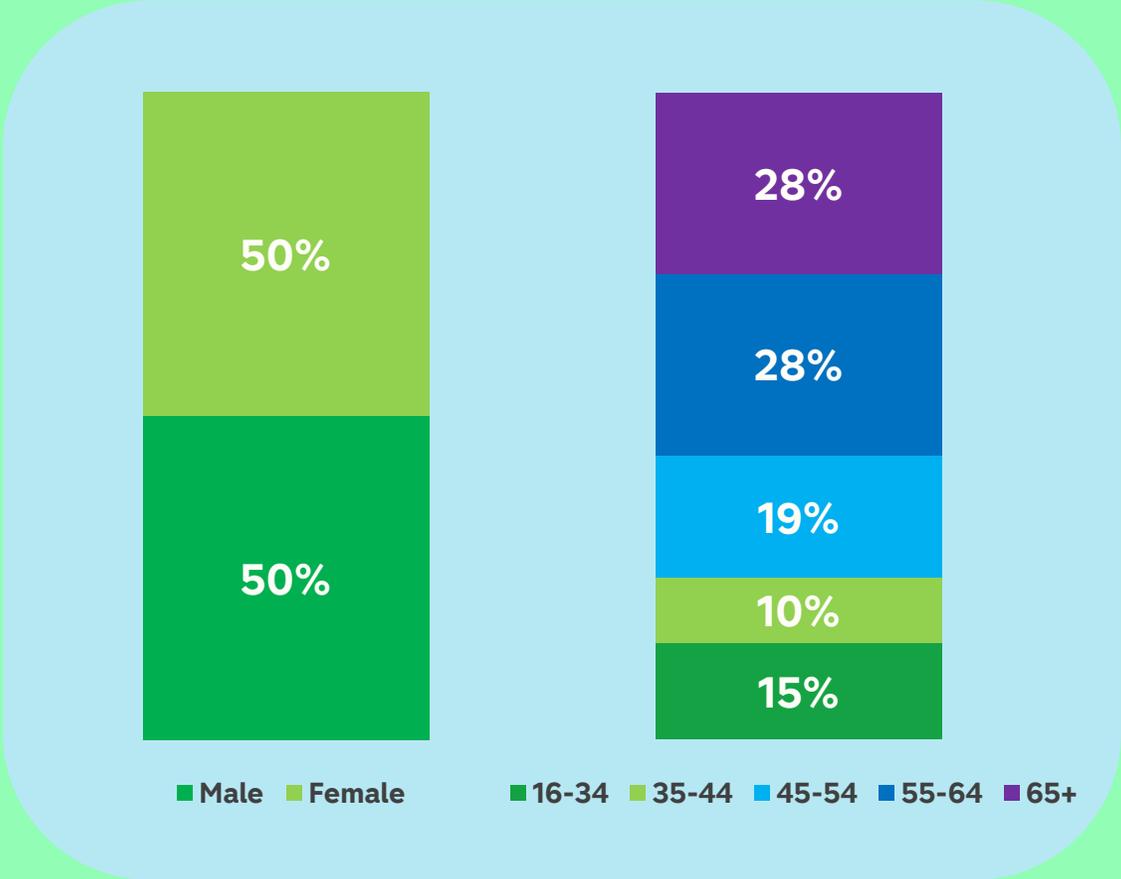


Sustainability Insight

CORE  |  YOUTH

Methodology



We sent a survey to our Core4 community - which is made up of a subset of our All 4 registered viewers – and our 4Youth community made up of 16-24s. In total **we collected 817 responses.**

Respondents were asked questions about their attitudes towards the environment and sustainability. We covered several topics including the impact on purchase decisions and sustainability in a digital space.

Our sample was self selecting and has an even gender split that skews slightly older.



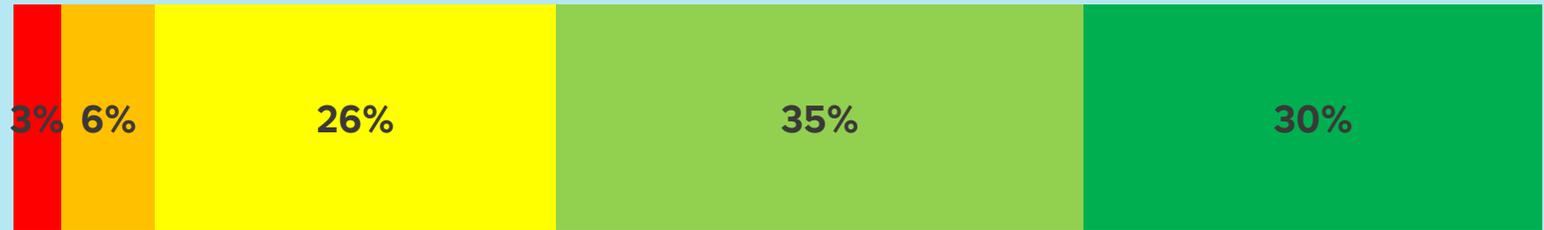
Source: Core4 and 4Youth survey, n = 817

65% of adults are concerned about the climate crisis

How do you feel about the current climate crisis?

Not at all concerned

Extremely concerned



74% of 16-34s are very or extremely concerned vs. 63% of 35+s

73% of women are concerned vs. 56% of men

65% of adults are very or extremely concerned

*4 in 10 feel that the pandemic has made them increasingly aware of their impact on the environment



Concerns surrounding the environment are encouraging UK adults to make changes

65% of respondents are concerned about the climate crisis

88% of respondents have made changes to be more sustainable

75% of respondents do not think that sustainable products/ services are easily accessible or inclusive

89% of adults think that brands need to do more

66% of respondents do not feel that they know enough about how they can help the climate crisis

Inspirations for Environmental Change

58% of respondents named Television Programmes as a key source of inspiration for Environmental Change

What would inspire you to make changes in your behaviour to benefit the environment?



Scientific Reports
and Journals

60%



Television
Programmes

58%



News
Reports

55%



Newspaper or
Magazine Articles

39%



Radio
Programmes

5%



TV Adverts

23%



Articles or Blogs
Online

20%



Social Media
Posts

20%

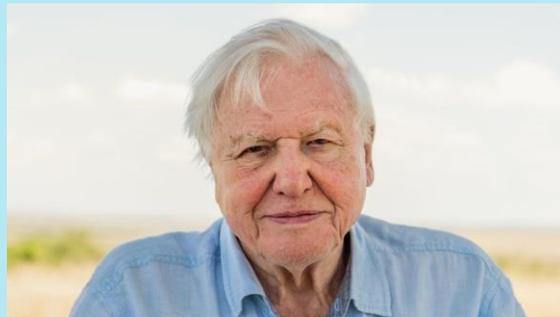
People look to their friends and family for inspiration, as well as prominent environmental activists for inspiration

What would inspire you to make changes in your behaviour to benefit the environment?



Individuals
17%

People trust and look to environmentalists like David Attenborough and Greta Thunberg for environmental inspiration:



40%

of those who selected individuals as a source of inspiration mentioned Attenborough

"People like David Attenborough who are knowledgeable and whose careers have been devoted to nature, the planet and conservation."



TV programmes and adverts are trusted sources of information, especially for those aged 16-34

When asked **why** they think TV programmes and advertisements are an effective inspiration for environmental change, they said:



TRUSTWORTHY

- Respondents felt that content shown on TV appears to be truthful and reliable



VISUAL

- The visual element of TV helps to emphasise the issue and its effects



LARGE AUDIENCES

- The ability to reach large groups increases overall awareness

39%

of respondents aged **16-34** said **TV adverts** would inspire them to make changes to benefit the environment vs. **23%** of all adults

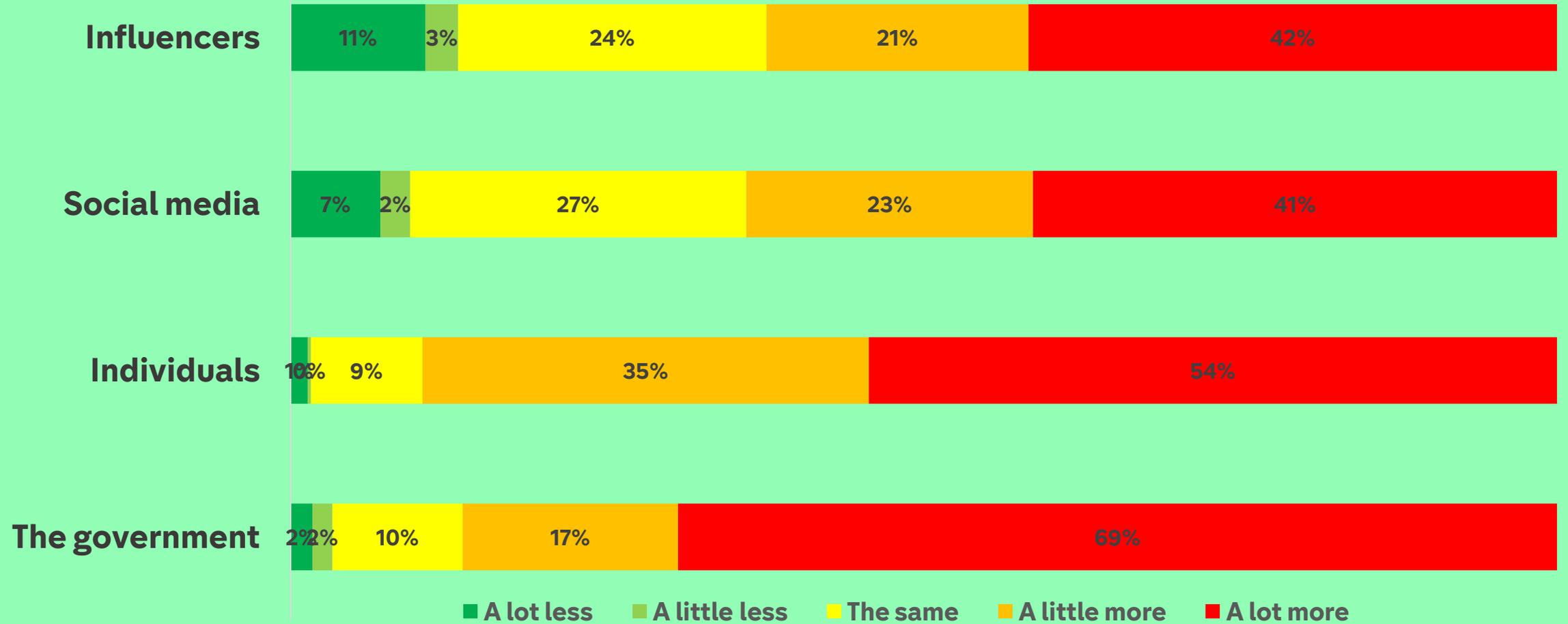
"Because TV shows you the reality of climate change, vs just hearing about it or reading about it. People are more responsive to visuals - especially video footage of the consequences of something."



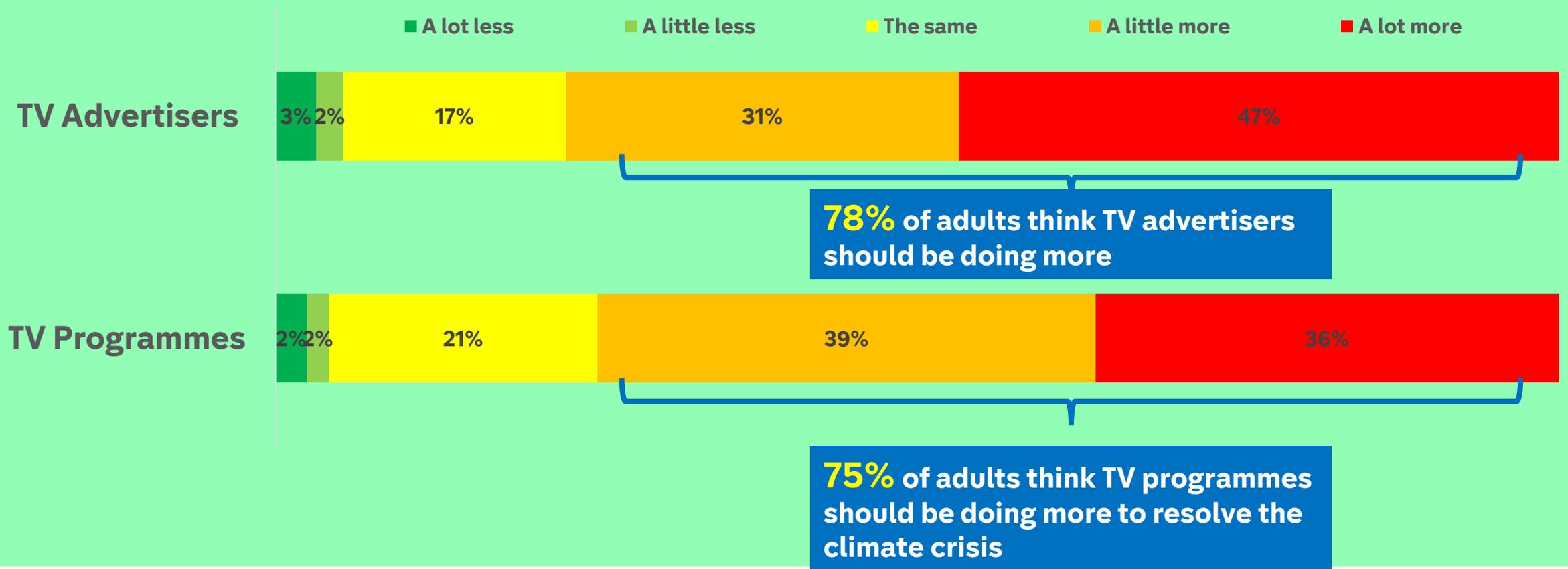


Contributions to Environmental Change

Nearly 70% of respondents feel that the government should be doing a lot more



Adults feel that TV Programmes and Advertisers have a responsibility to do more to resolve climate change



There is increasing demand for brands to be more sustainable

*78% of Channel 4 viewers agree that "It is important that a company acts ethically"

The most commonly mentioned brands were:

1.



Ecover

2.



Body Shop

3.

LUSH
FRESH HANDMADE COSMETICS

Lush

4.

**CO
OP**

Co Op

When asked to think of **sustainable brands**, the most commonly mentioned sectors were:

- Cleaning/household
- Cosmetics/toiletries
- Groceries
- Fashion

6% of respondents mentioned **Ecover**

Other brands mentioned include: Innocent, House of Sunny, Patagonia, Waitrose and Lucy & Yak

"Lush - how they incentivise you to return packaging as a cycle of reuse which rewards the customer. Their whole brand is built around it and you get the sense it's the thought process behind everything that goes into their products."

Although 18% could remember seeing an advert that had environment/climate change messaging, many struggled to call out specific brands

The most commonly mentioned brands were:



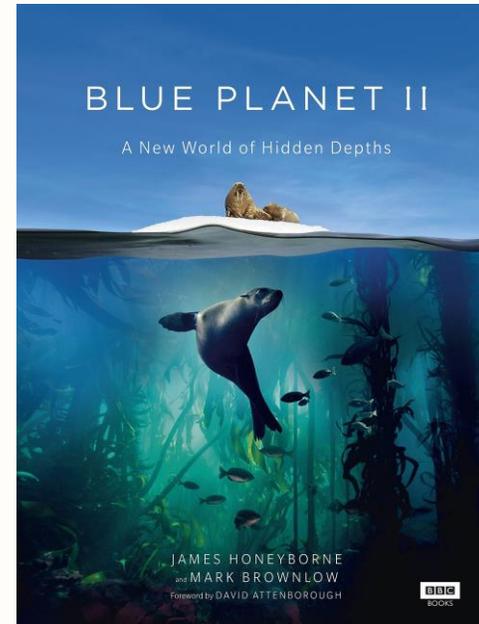
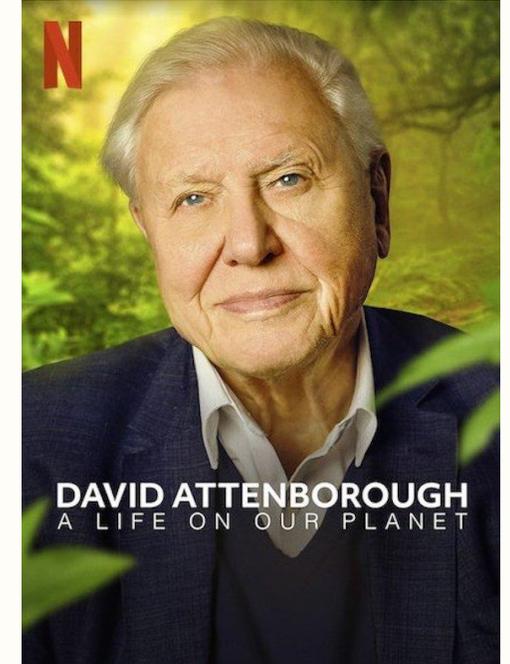
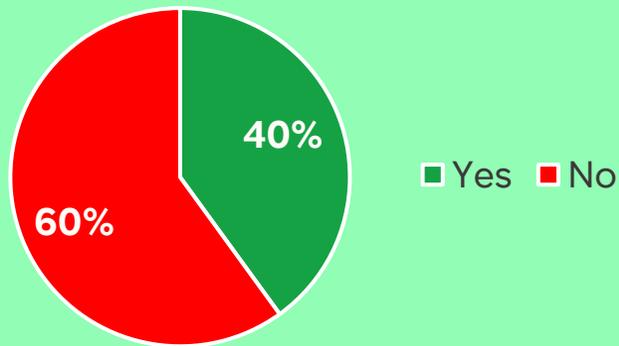
Although 18% could remember seeing an advert that had environment/climate change messaging, they couldn't all recall the actual brands. The most commonly mentioned adverts were **IKEA's** 'Fortune Favours the Frugal' and **Carlsberg & WWF's** partnership.



40% of adults said they have seen TV programming that has effectively highlighted the climate crisis within the last year

The majority of programming mentioned took a documentary format. The most commonly mentioned broadcaster was BBC, there were several mentions of Netflix originals too. They also identified how shows like Grand Designs often had sustainability in mind.

Are there any TV programming you have seen in the last year that you feel has effectively highlighted the climate crisis?

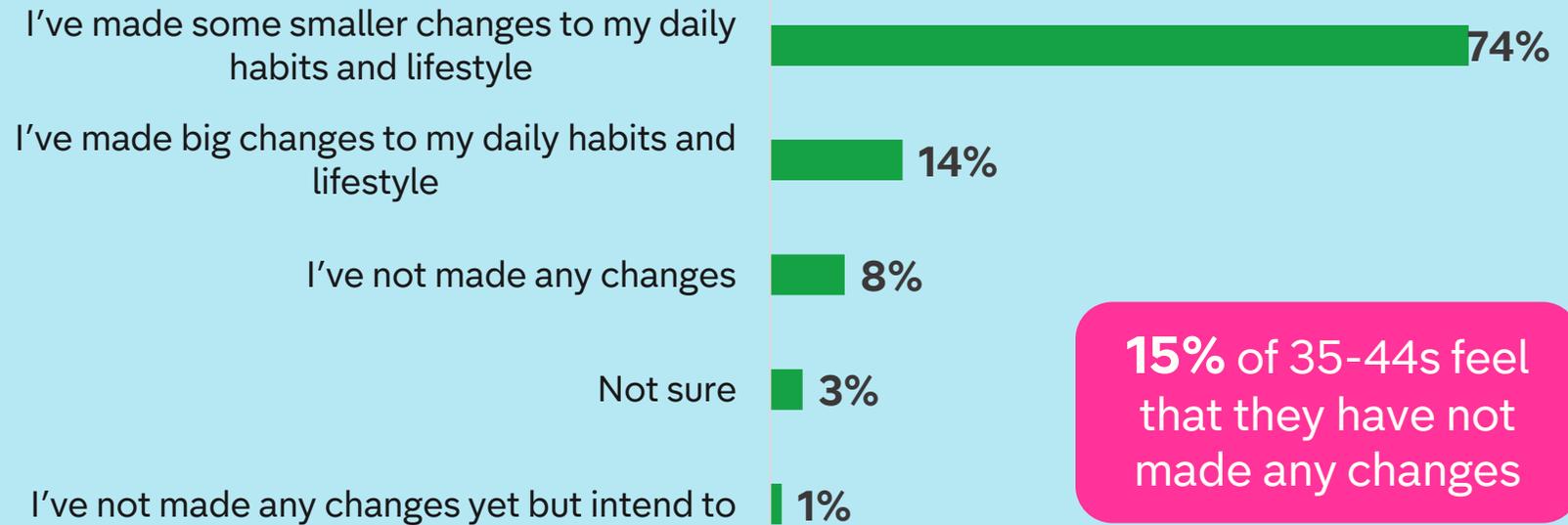




Day-to-Day Changes in Response to Climate Change

88% of respondents have made changes to be more sustainable

Overall, to what extent would you say you have changed your day-to-day habits to be more sustainable?



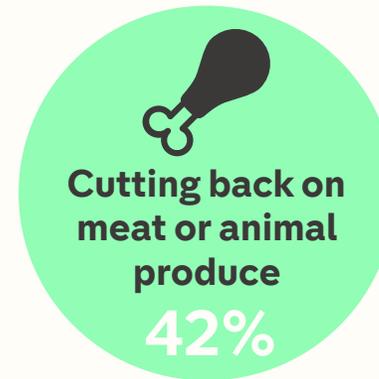
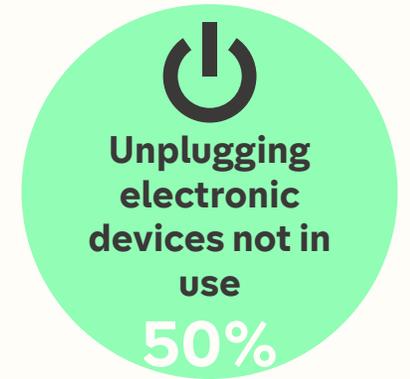
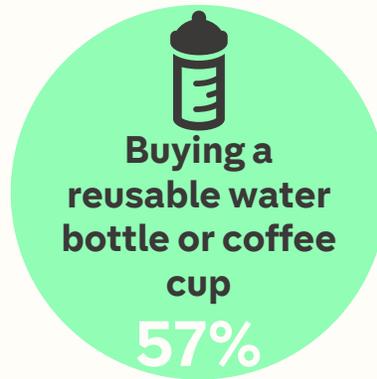
95% of women have made changes **vs.** **79%** of men

15% of 35-44s feel that they have not made any changes

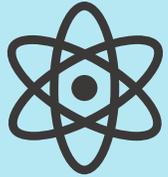
***59%** of Britons feel that major lifestyle changes will be necessary to limit the impact of climate change

The most common things people have started to do in the last few years to be more sustainable, are use a reusable bag and recycle

***50%** of UK adults 16+ say "I am prepared to make lifestyle compromises to benefit the environment"



Some of the most common individual changes were associated with energy usage and food consumption



Changes in energy consumption

36% using a washing machine less frequently

34% switching energy provider

30% switching to a renewable electricity tariff

24% turning off 4G/mobile data when not in use

10% investing in sustainable home developments



Changes in eating habits

42% cutting back on meat or animal produce

34% growing crops and plants in own garden

19% trying zero-waste food recipes

12% cutting out all meat or animal produce



The future is green as 51% of 16-34s said that they have reduced their overall consumption by buying less in the last few years

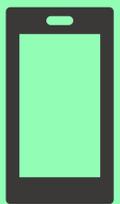
16-34s are changing the way they interact with brands and make purchasing decisions:



45% of 16-34s purchase from brands who are sustainable vs. **29%** of all adults



34% of 16-34s research how sustainable brands are vs. **16%** of all adults



24% of 16-34s follow brands that promote sustainability on social media vs. **10%** of all adults

***45%** of Gen-Z have stopped purchasing certain brands because of ethical or sustainability concerns

31% of 16-34s are choosing to buy vegan cosmetics vs. **12%** of all adults

43% of 16-34s pick to buy clothes from charity shops or sites like Depop to prevent fast fashion vs. **29%** of all adults



75% of respondents do not think that sustainable products/ services are easily accessible or inclusive

What makes sustainable alternatives less accessible:



COST

- Many feel that products marketed as sustainable come with a premium price



HARD TO FIND

- Respondents feel they have to actively look out for them



USER FRIENDLY

- Certain sustainable products don't consider disability inclusion for instance plastic straw alternatives

Greenwashing was flagged as a marketing ploy used to charge a higher price

"For example some people with certain disabilities can only use plastic straws which are the least sustainable and some sustainable swaps are not affordable for everyone."

"They are often more costly upfront i.e. branded clothes over cheap and lower quality clothes. Not everyone can make the time commitment i.e. walking over driving. Making sustainable choices requires a lot of mental investment because most brands do the bare minimum required to satisfy current laws."



We are increasingly seeing people take part in climate change activism

22% of respondents said they have signed petitions about or been to a climate related protest in the last few years

27% say they had started to question that actions of larger organisations – **46%** for 16-34s

5% say they have attended a climate change march or protest – **13%** for 16-34s

5% have joined a local/community groups associated with climate action – **7%** for 16-34s



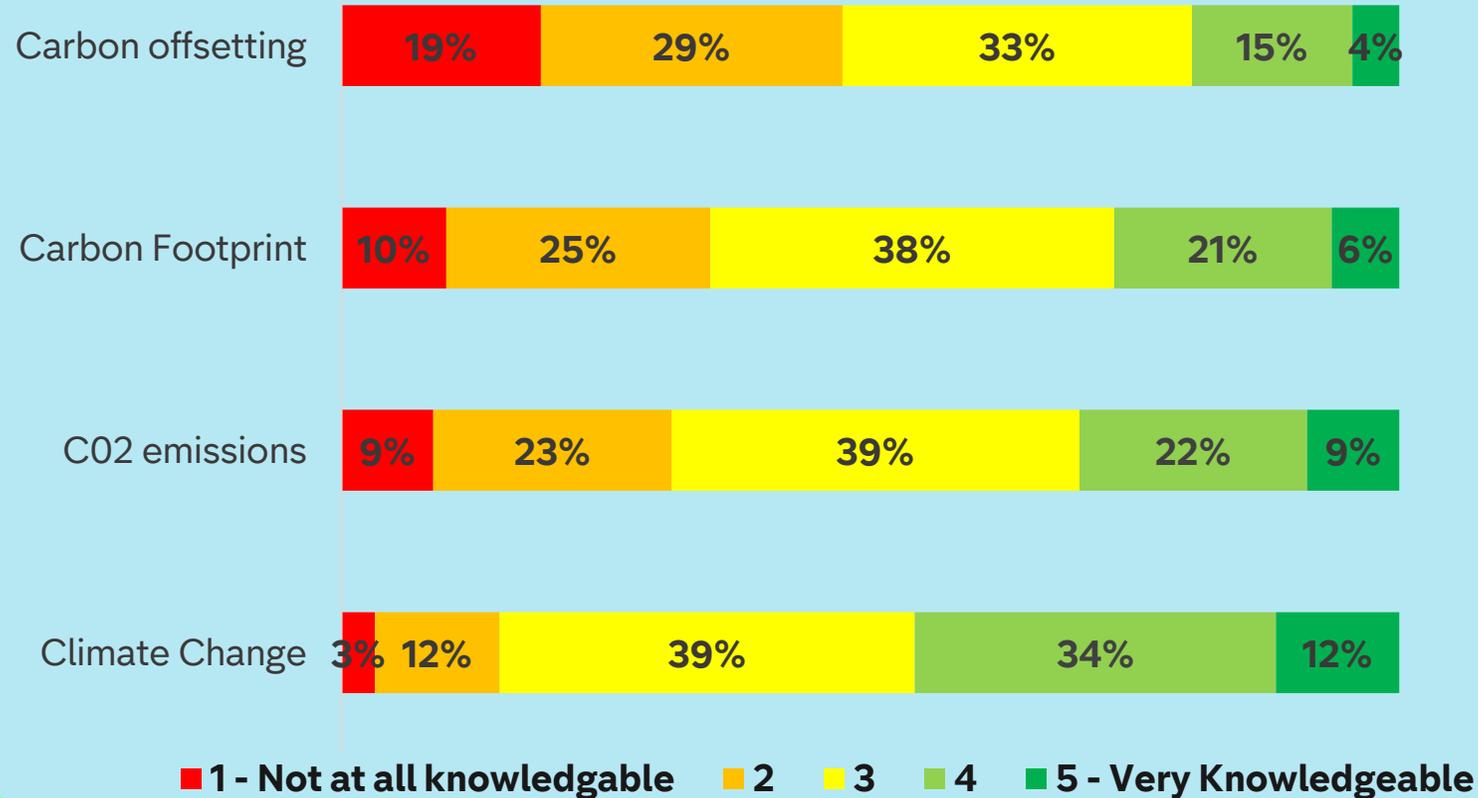
"I have signed petitions opposing HS2 for environmental damage, one for more wind farms, and many against plastic pollution."

"I have signed countless climate related petitions and I intend on attending climate related protests in the future."



**Knowledge of issues
surrounding
sustainability**

In general, UK adults are not confident in their knowledge of sustainability related topics



Nearly half **48%** of respondents feel they have are not very knowledgeable about **carbon offsetting**

***5%** said they have purchased carbon offsets in the last few years

***15%** of brits say they haven't adopted a more sustainable lifestyle because they don't have enough information



66% of respondents do not feel that they know enough about how they can help the climate crisis

The majority of respondents want **practical tips** on **small changes** they can make as individuals:

"Simple, cheap "wins" - things I could do immediately and without any effort/expense"

"I'd just like to know what an average person can do without drastically altering their way of life."

"More information on small changes we can make to have an impact, including digital changes I previously haven't thought about"

What else do they want to know:

How much difference their changes will make and how we can measure this

How to find out which brands are 'genuinely sustainable' and not greenwashing

Comparisons of the difference between things and their sustainable alternatives such as traditional energy vs. renewable



Some of the biggest misconceptions amongst UK adults are associated with food production and consumption

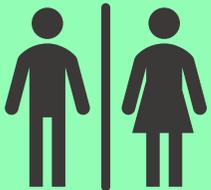
We showed our participants some sustainability based facts to see whether they thought they were true or false – to identify where their misconceptions lie.



29% of respondents assumed that "Around 16,000 litres of water is consumed to make just 1kg of beef" was false



40% of respondents assumed that "Those who eat meat spend £645 extra a year on food, compared to those with a meat-free diet" was false



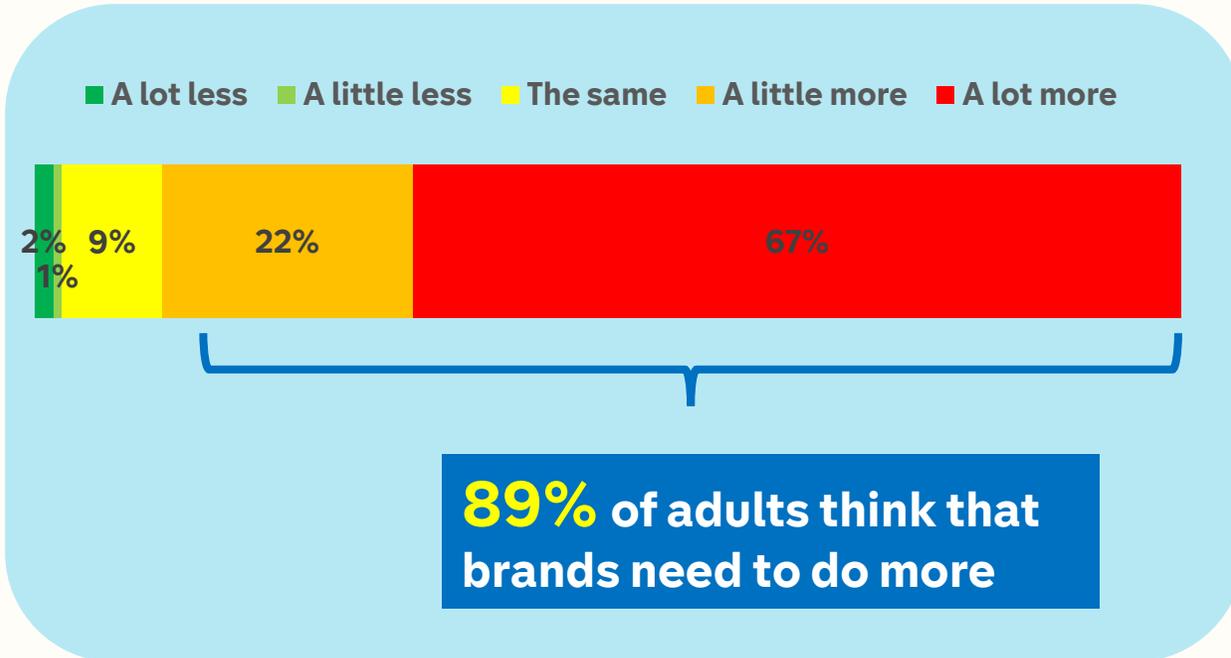
80% of respondents assumed that "262,000 more men than women don't consume meat" was false

In the UK the number of people opting to have a vegan diet is increasing, during January of 2021 500,000 people took part in Veganuary* – a pledge to eat plant based for a month.

Although veganism is becoming more common, there are several misconceptions surrounding meat consumption and a plant based diet. There is often an expectation that veganism is expensive and that women are more likely than men to have a vegan diet.



Brands need to show viewers **what** they are doing and **how** this will make a difference



"I think making the sustainable practices involved in producing an item more apparent would be good advertising and more informative. Having more sustainable ad campaigns in general by carbon offsetting would also be good."

What do viewers want to see in advertising:

HONESTY

- They want to see the actual benefits of sustainable products/services

HOW BRANDS ARE CHANGING

- What sustainable practices are they adopting and why this makes a difference

LESS PACKAGING

- The main thing they want to see is less/no packaging or plastics

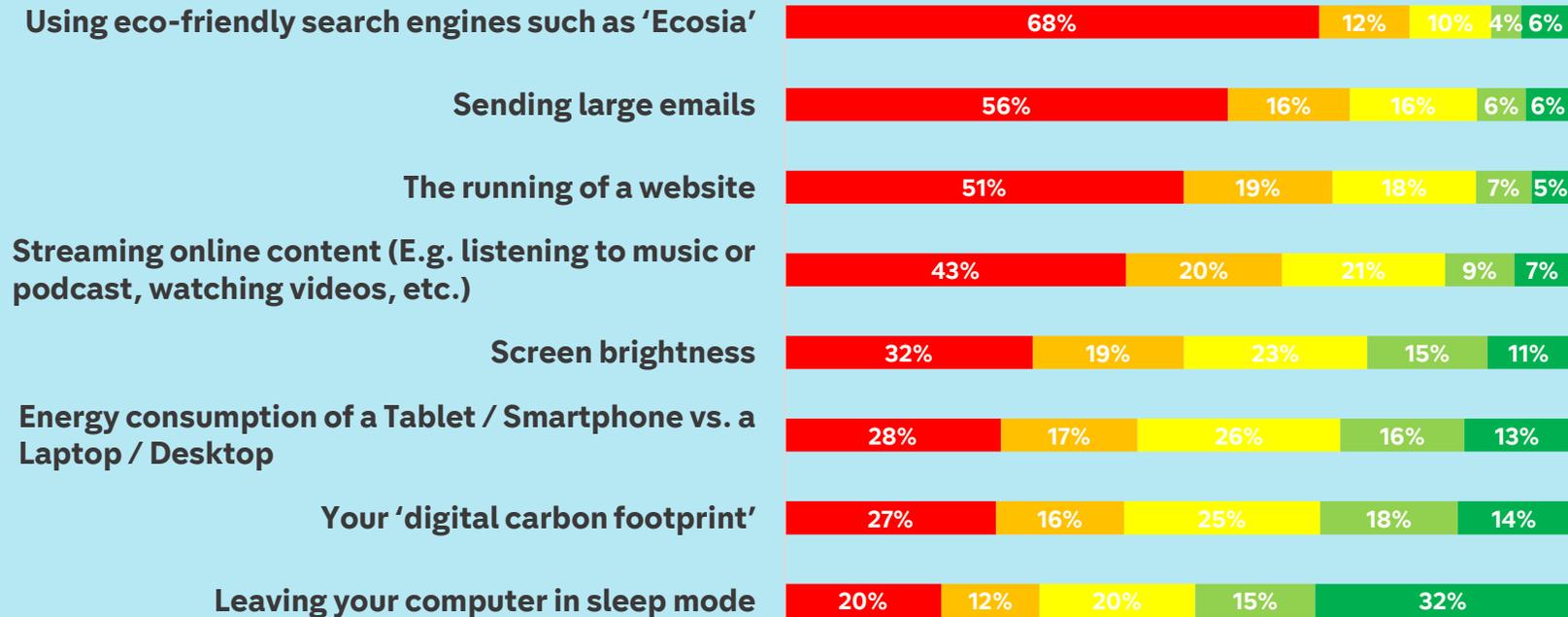




The Environmental Impact of Digital Technology

Consideration around the environmental impact of digital technology is low amongst UK adults

Have you ever considered the environmental impacts of the following:



Never considered

Often consider



68%

have never considered using an eco-friendly search engine

Although over 50% don't consider their screen brightness, 91% assumed the statement "Reducing your PC monitor brightness from 100% to 70% can save up to 20% of the energy the monitor uses" was true



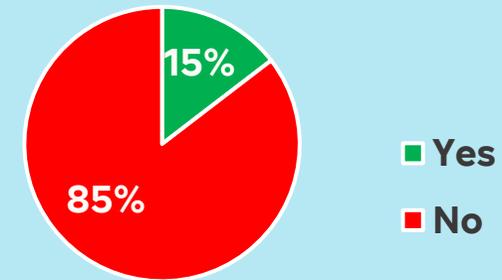
85% do not think there is enough awareness of the concept of having a personal digital carbon footprint

The majority of respondents had never come across the idea of a digital carbon footprint before suggesting more needs to be done to increase awareness. Those that had heard of it, feel it is a relatively **new term** and that they **don't fully understand** it so would benefit from more education around the topic.

15% said that they thought that there **is** enough awareness they had seen coverage:

- On TV
- Webpages
- Science reports/journals
- YouTube
- School/university
- Documentaries
- Crypto currency association

Do you think the concept of having a personal digital carbon footprint is something that has enough awareness around it?



"No, I think people only think of physical footprints. They do not assume that an email or web search has an impact on the environment too"



29% of respondents associated All 4 with being the most environmentally friendly commercial VOD player

The top environmentally friendly VOD players:



BBC iPlayer 37%



All 4 29%

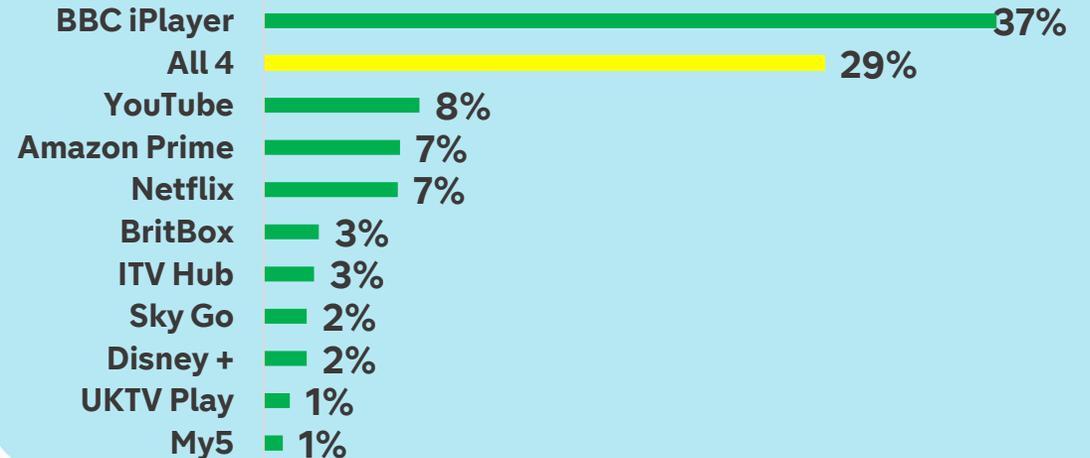


YouTube 8%



Netflix 7%

Which VOD player do you associate with being the most environmentally friendly?

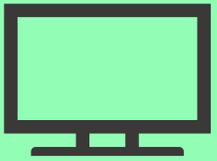


"All 4 seems to be a channel that is very aware and trying to help/educate on social issues."



Respondents struggled to define what would make a VOD player seem more environmentally friendly

When asked **why** they think certain platforms appear more environmentally friendly they said:



CONTENT

- Respondents felt it was important to have programming that showed climate change in action



GOVERNMENT ASSOCIATION

- For government/public funded platforms, respondents feel they have a bigger responsibility to be eco conscious



ETHICS

- They thought that companies they perceived to be more socially conscious would be eco friendly by default

The Ethical Consumer* rated All 4 as the most ethical streaming service. Their scoring is based on 5 main areas: animals, environment, people, politics and product sustainability.

"Simply because they tend to a lot of documentaries around the environment so I'm assuming they would work hard to ensure they are as environmentally friendly as they can be"

Respondents want All 4 to provide **practical advice** on what they can do as individuals to become more sustainable

Which of the below would you like to see more of from All 4?



16-34s especially want to see increased efforts to promote sustainability:

64% For All 4 to give me tips on how to make my viewing habits more environmentally friendly

61% Programmes around how I can be more sustainable

58% Marketing about how they are actively reducing their carbon footprint

58% Launching a pledge about their environmental goals

55% Having more brands discussing the environment in their advertising



Sustainability Insight

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