



Carbon Trust

A global survey of young adult's perceptions of
carbon and climate change

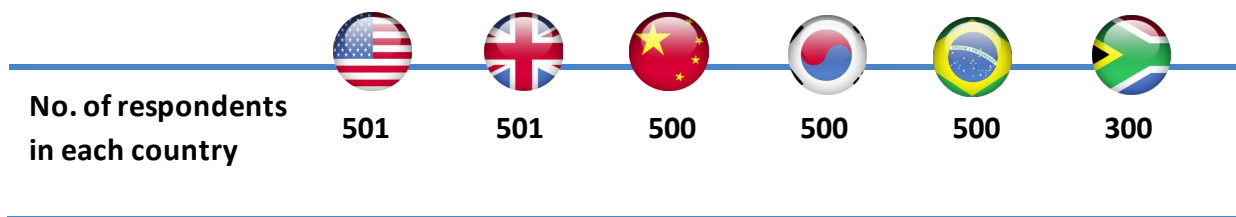
April 2012

Methodology

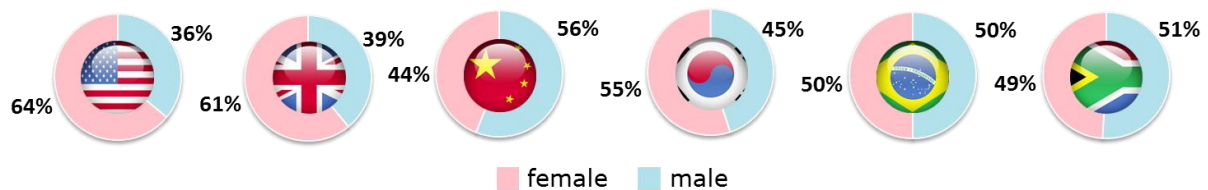
Objective

Understand young adults' awareness and attitudes towards climate change and carbon, as well as its impact on their perceptions of companies and brands.

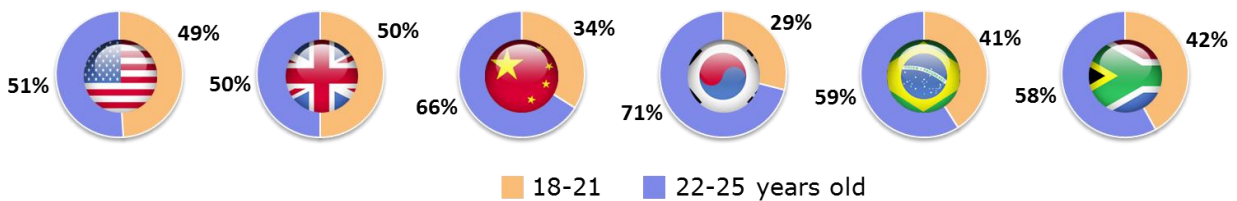
- Online fieldwork conducted between 24th February and 6th March 2012
- Male and females aged 18 – 25 years old
- 6 countries: US, UK, China, South Korea, Brazil & South Africa



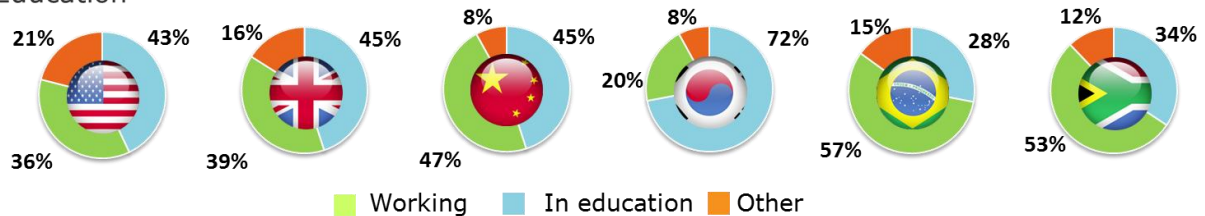
Gender



Age



Education



Awareness & attitude towards climate change and carbon footprint






Q5. Thinking about your attitudes towards climate change in general, how much do you agree or disagree to the following statements?

Base: all respondents

Across all markets the majority of young adults are more concerned about climate change than their parents or grandparents. They also agree that recent natural disasters are the result of climate change.

My generation is more concerned about climate change than my parents or grandparents

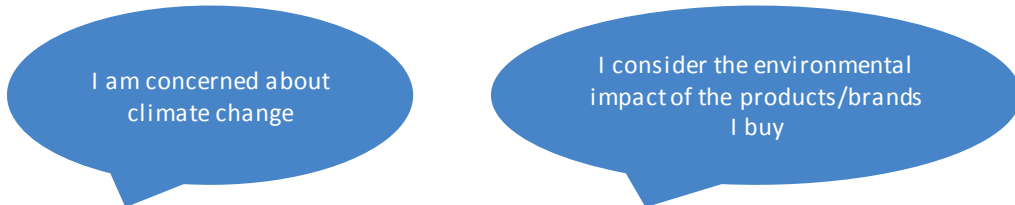
Recent natural disasters, such as flooding in Australia & severe winters in EU, are the result of climate change







	63%	49%
	64%	57%
	81%	83%
	56%	78%
	71%	82%
	74 %	75%

Q5. Thinking about your attitudes towards climate change in general, how much do you agree or disagree to the following statements?

Base: all respondents

Though an increasing number of young adults are concerned about climate change (with the highest percentage in Brazil), fewer people consider the environmental impact of the products and brands they purchase



	51%	39% (32%)
	56%	32% (33%)
	58%	49% (21%)
	61%	37% (37%)
	80%	64% (22%)
	71%	53% (19%)

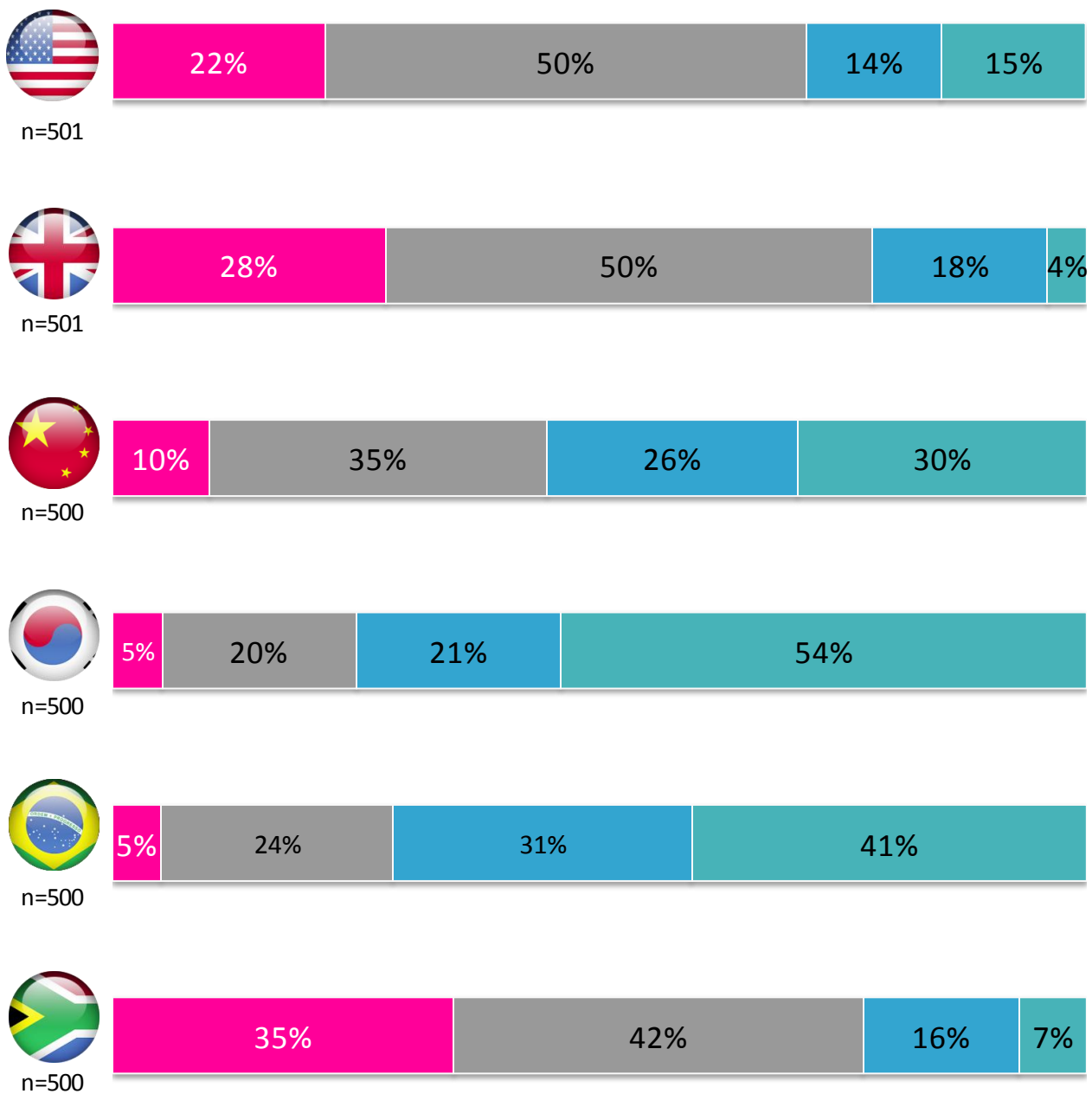
(x%) = neither agree or disagree

Q6. Are you aware of the term “carbon footprint”? Please select the statement that best applies to you.

Base: all respondents

Although awareness of the term ‘carbon footprint’ is high in the US, UK and South Africa, the majority either don’t use it or don’t know what it means. Awareness is considerably lower in South Korea and Brazil.

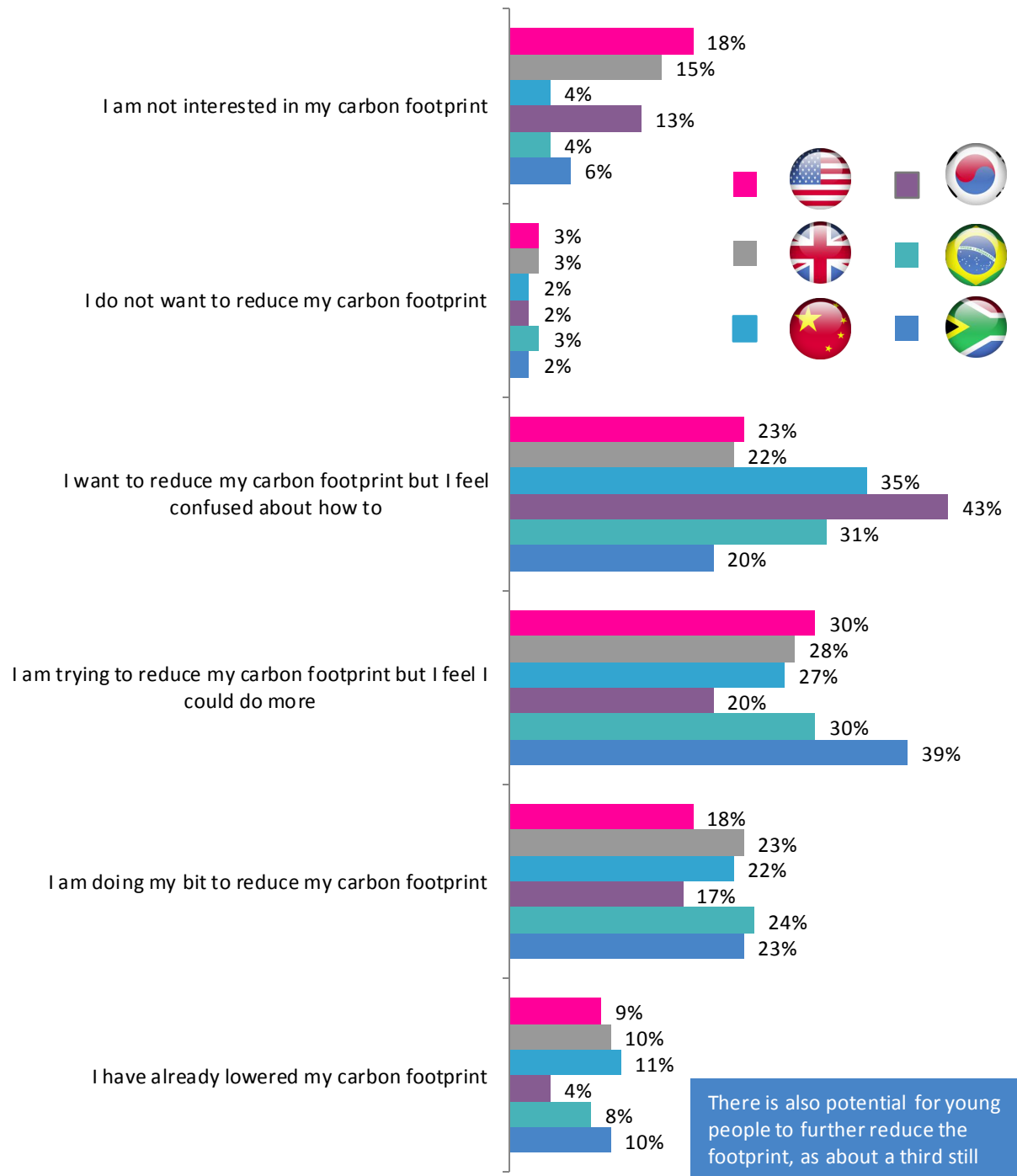
- Yes - term I use
- Yes - heard it mentioned but don't use
- Yes- but not sure what means
- No



Q7. Thinking about your personal carbon footprint, which one of the following statements do you most agree with?

Base: all respondents

Most young adults across all markets would like to reduce their carbon footprint but are unsure how to do so or how they could do more. This uncertainty is particularly pronounced in South Korea, China and Brazil.



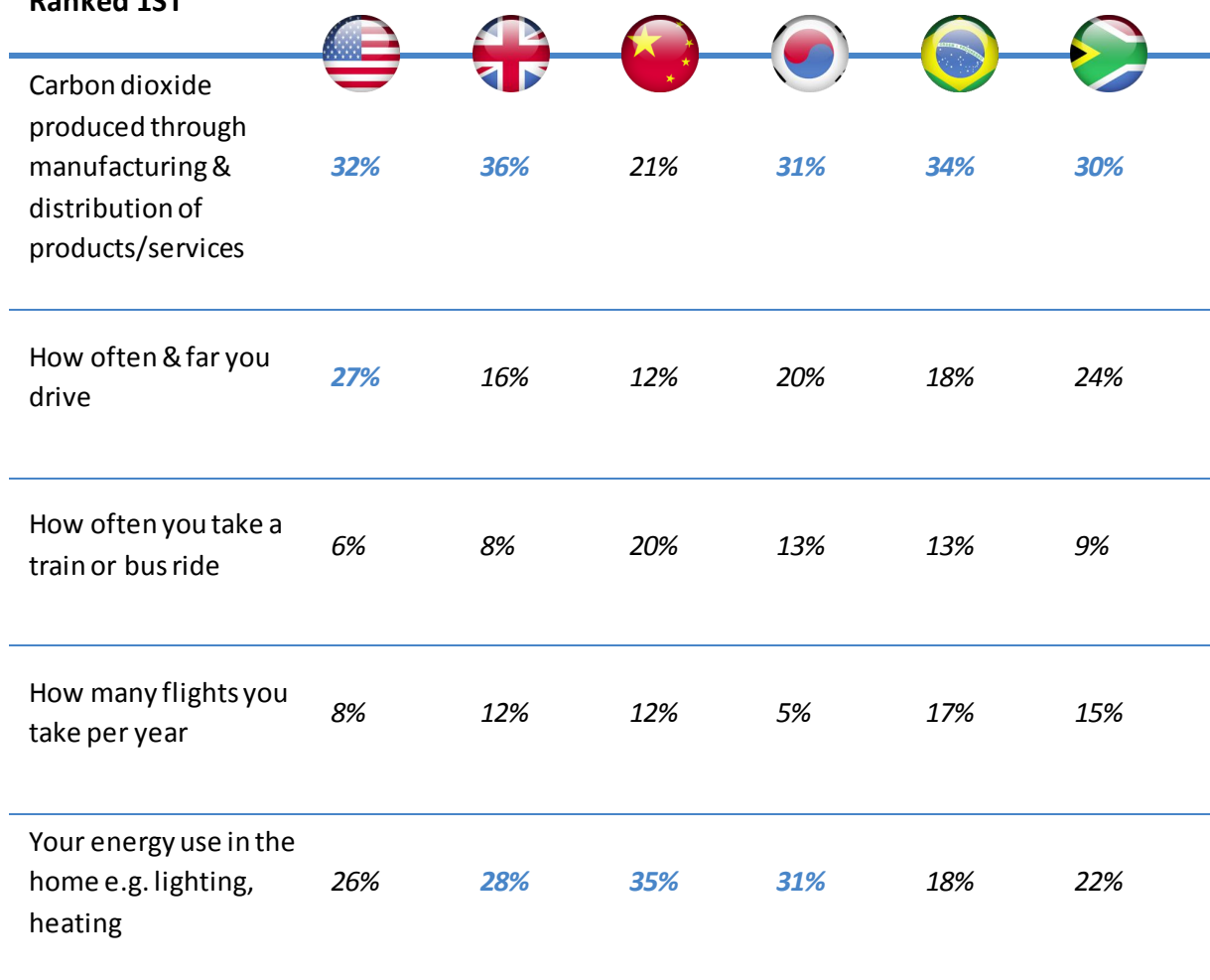
There is also potential for young people to further reduce the footprint, as about a third still feel they could do more, particularly in South Africa.

Q8. Which of the following activities do you think has the biggest impact on your personal carbon footprint, on a daily basis?

Base: all respondents

Most young adults across the majority of countries believe that carbon dioxide produced through the manufacture and distribution of products and services has the highest impact on personal carbon footprint. The exceptions are China and South Korea, where people also consider energy usage at home to be one of the major factors.

Ranked 1ST









Q9. Which of the following would have the most influence on your attitude towards your carbon footprint?

Base: all respondents

In the US, UK, Brazil and South Africa information and advice from companies plays an important role in influencing young people’s attitudes towards their carbon footprint. In China and South Korea, newspapers and magazines have the highest influence.






Top 2 factors influencing attitude towards carbon footprint

					
Companies providing info/advice	Companies providing info/advice	Newspapers/ magazines	Newspapers/ magazines	Companies providing info/advice	Companies providing info/advice
31%	32%	32%	33%	29%	32%
Friends	Parents	Friends	Advertising	Newspapers/ magazines	Newspapers/ magazines
28%	24%	20%	23%	22%	20%

Taking action to reduce carbon

Q10. Assuming that these actions would not change the price of products or services, which of the following would you consider doing and which would you not?

Generally speaking, young adults across all markets are receptive to different ways of reducing their carbon footprint, with the exception of taking fewer trips/ overseas holidays.







	Most likely to consider... (Most definitely/probably would)	Least likely to consider... (Most definitely/probably would not)
	Follow energy saving advice on packaging (86%)	Take fewer trips/overseas holidays (40%)
	Follow energy saving advice on packaging (88%)	Take fewer trips/overseas holidays (51%)
	Use services or brands with good environmental reputation / follow energy saving advice (93%)	Take fewer trips/overseas holidays (24%)
	Walk or use public transport instead of driving (87%)	Take fewer trips/overseas holidays (45%)
	Follow energy saving advice on packaging (88%)	Take fewer trips/overseas holidays (46%)
	Follow energy saving advice on packaging (93%)	Take fewer trips/overseas holidays (43%)

Q11. Thinking about the goods that you buy every day, to what extent do you agree or disagree with the following statements?

Base: all respondents

In China, Brazil and South Africa, the majority of respondents are supportive of and seek action from brands regarding their carbon footprint. However, engagement is lower in the US and UK with less than 25% actively looking for information on the products they buy.

% who strongly/slightly agree

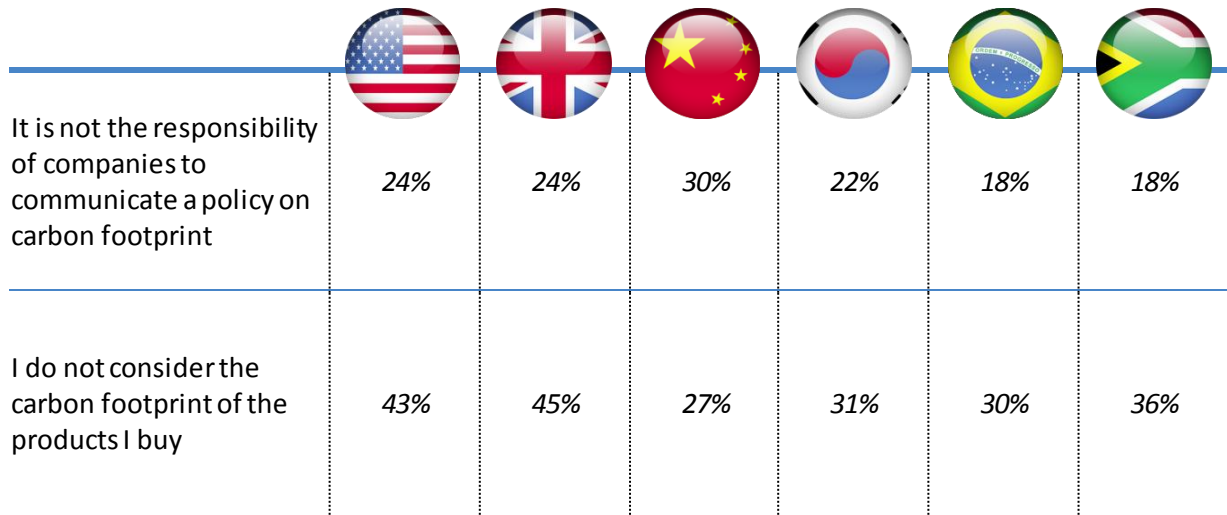
	 44%	 41%	 59%	 34%	 70%	 61%
I trust companies to accurately state the carbon impact of products & services						
I would like to see companies' carbon impact quantified by an independent organisation	55%	56%	84%	69%	73%	77%
Companies should be obliged to provide proof of their policy to reduce carbon footprint	58%	63%	79%	76%	81%	80%
I want my favourite brands to help reduce their carbon footprint	66%	66%	88%	81%	84%	86%
I actively look for information on carbon footprint on the products I buy	24%	24%	71%	31%	39%	30%
I would be more loyal to a brand if I could see it was reducing its carbon footprint	57%	55%	83%	73%	77%	76%
I would stop buying a product if its manufacturer refused to commit to measuring and reducing its carbon footprint	35%	36%	60%	53%	57%	51%

Q11. Thinking about the goods that you buy every day, to what extent do you agree or disagree with the following statements?

Base: all respondents

In the US and UK, the majority of young people think that it is not the responsibility of companies to communicate a policy on carbon footprint and a slightly higher proportion do not consider the footprint of the product they buy.

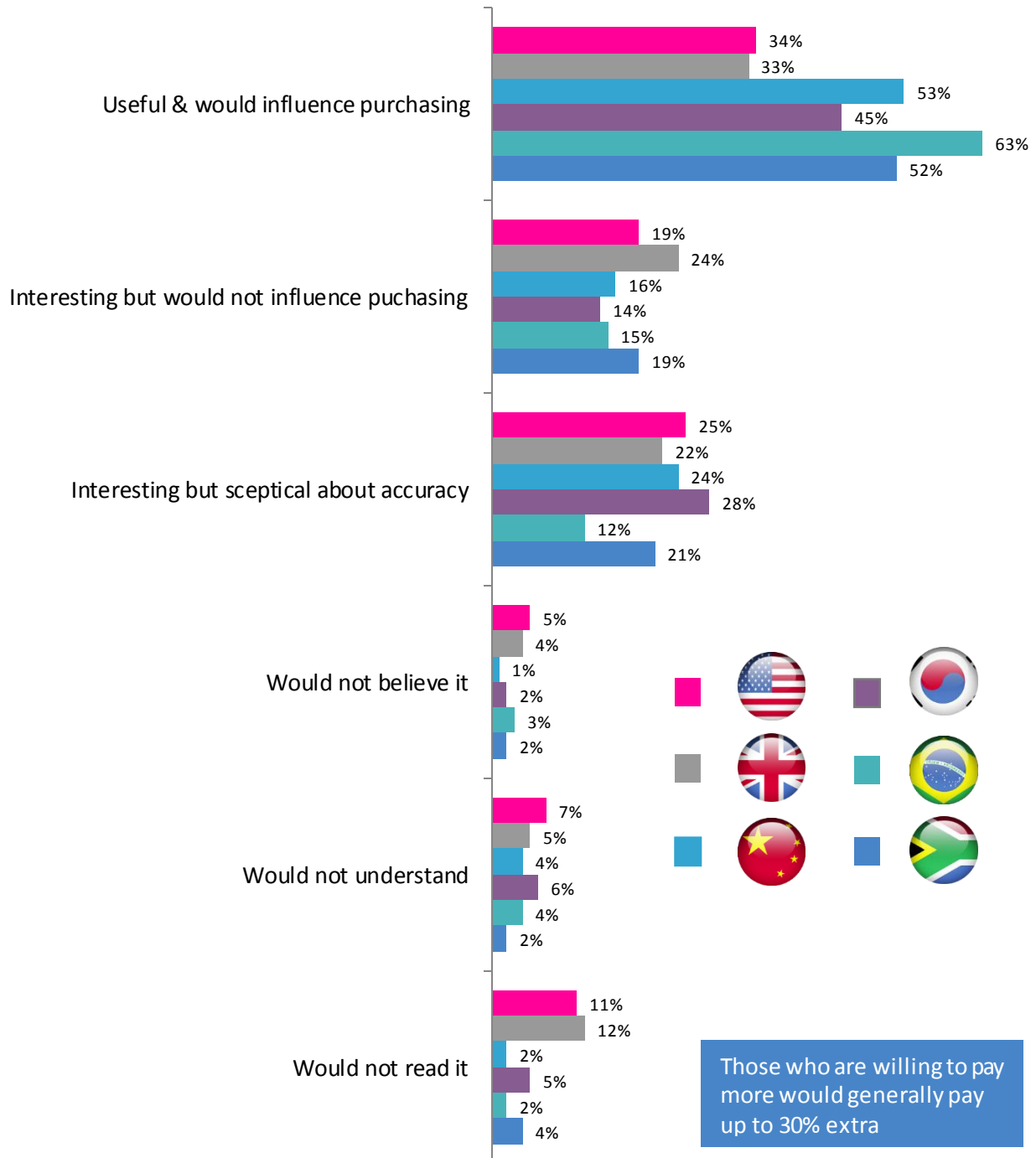
% who strongly/slightly agree



Q12. If a product showed information about its carbon footprint on its packaging, what would you think?

Base: all respondents

In China, Brazil and South Africa over half say that showing information about carbon footprint on packaging would be useful and influence their purchasing. However, a quarter in the US, China and South Korea say it is interesting but would be sceptical about its accuracy.



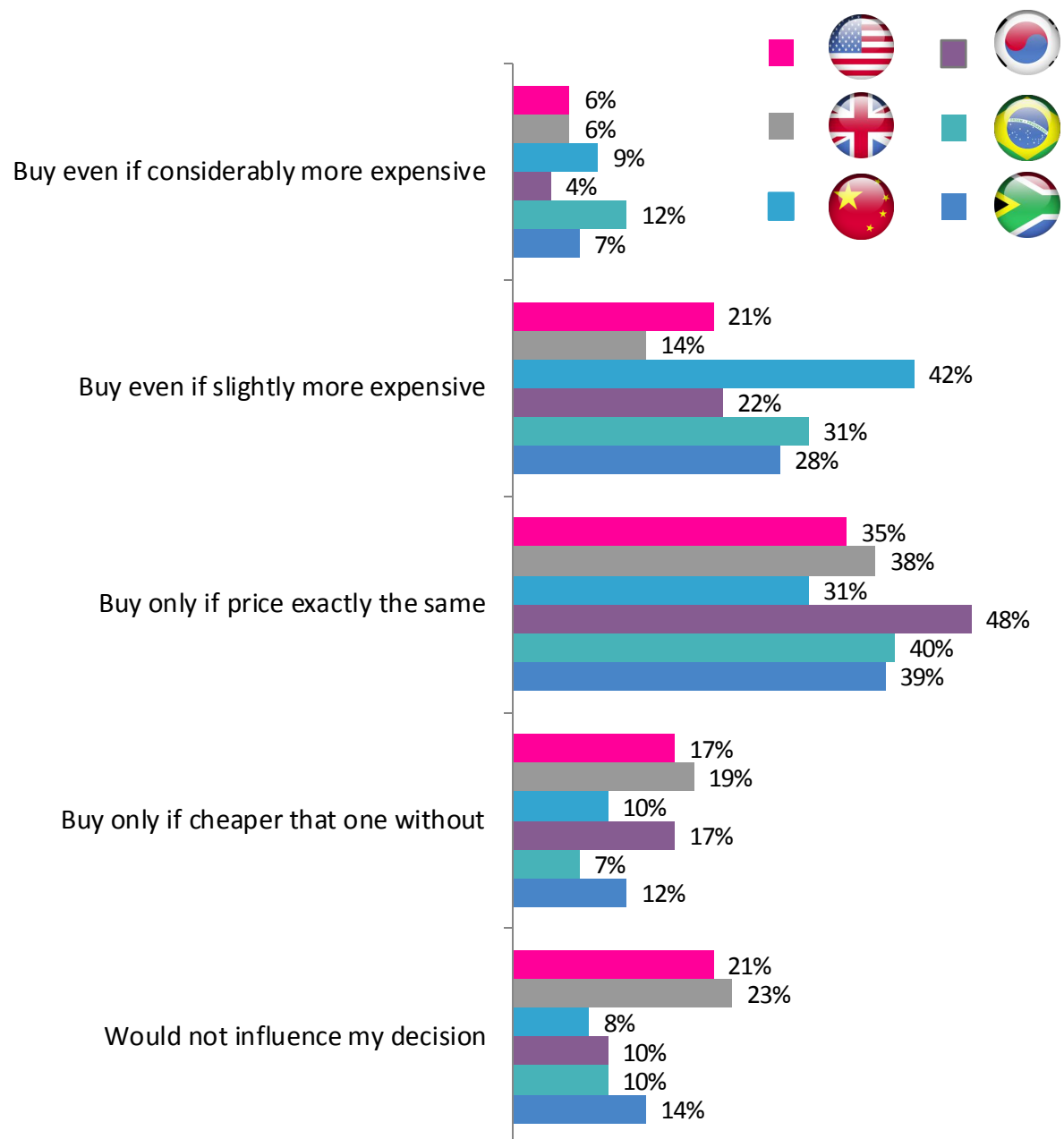
Q13. Imagine two identical products of the same quality, but one has information about its carbon footprint and the other one does not. What is the likelihood of you buying the one with information instead of the one without?

Base = all respondents

Q14. Please can you estimate how much extra you'd be prepared to pay for products showing this information?

Base= US 133, UK 98, China 256, Korea 128, Brazil 214, South Africa 106

Across all markets, the majority would only buy the product with the information if it was exactly the same price as the one without

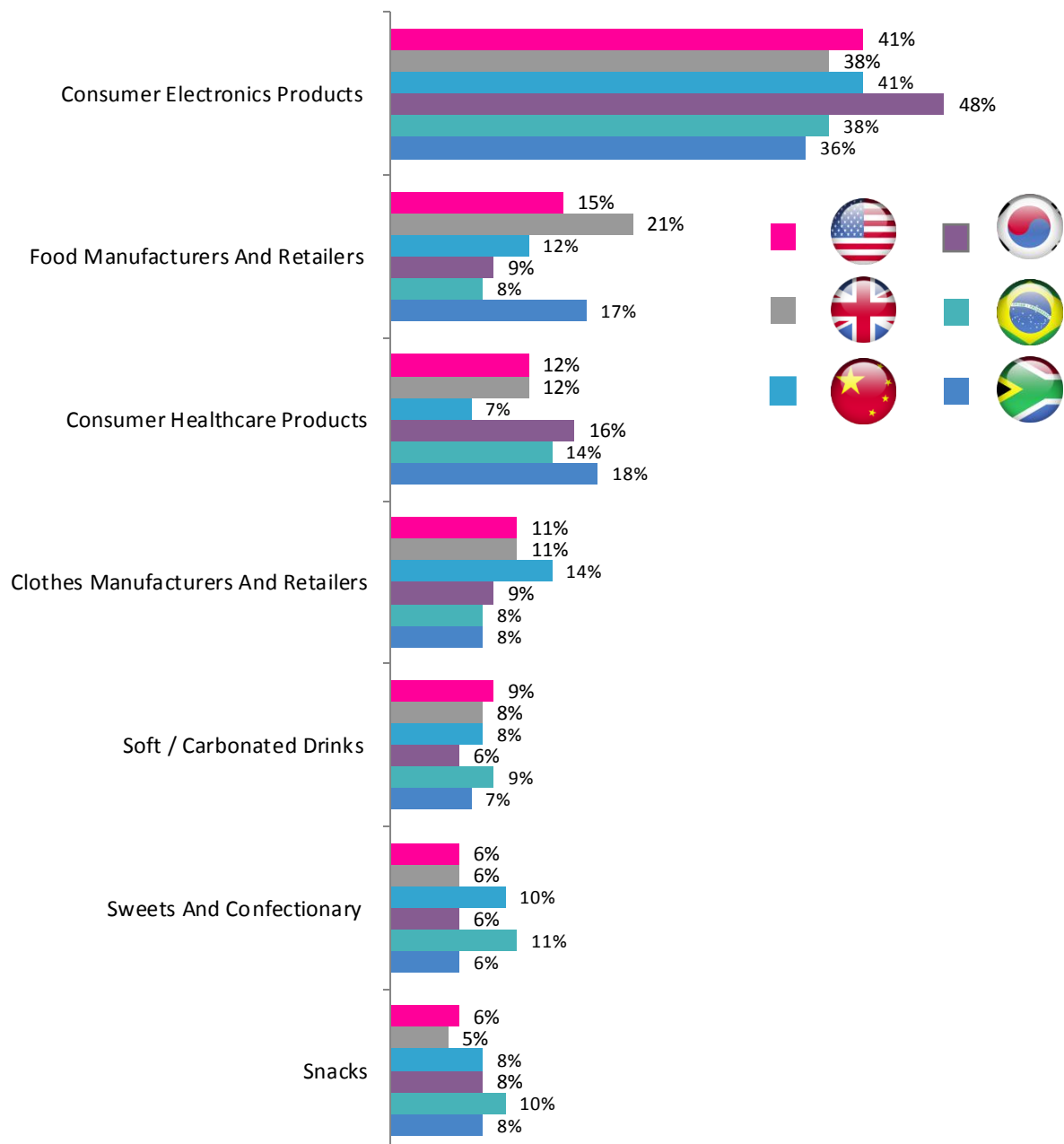


Q15. Which of the following products or sectors do you think can do the most to reduce their carbon footprint? Please rank the following products or sectors from 1 to 7, where 1 represents the greatest responsibility to minimise its carbon footprint.

Base = all respondents

Across all markets, consumer electronics are seen as having the greatest responsibility to minimise their carbon footprint

Category with greatest responsibility to minimise carbon footprint – percentage who ranked no. 1

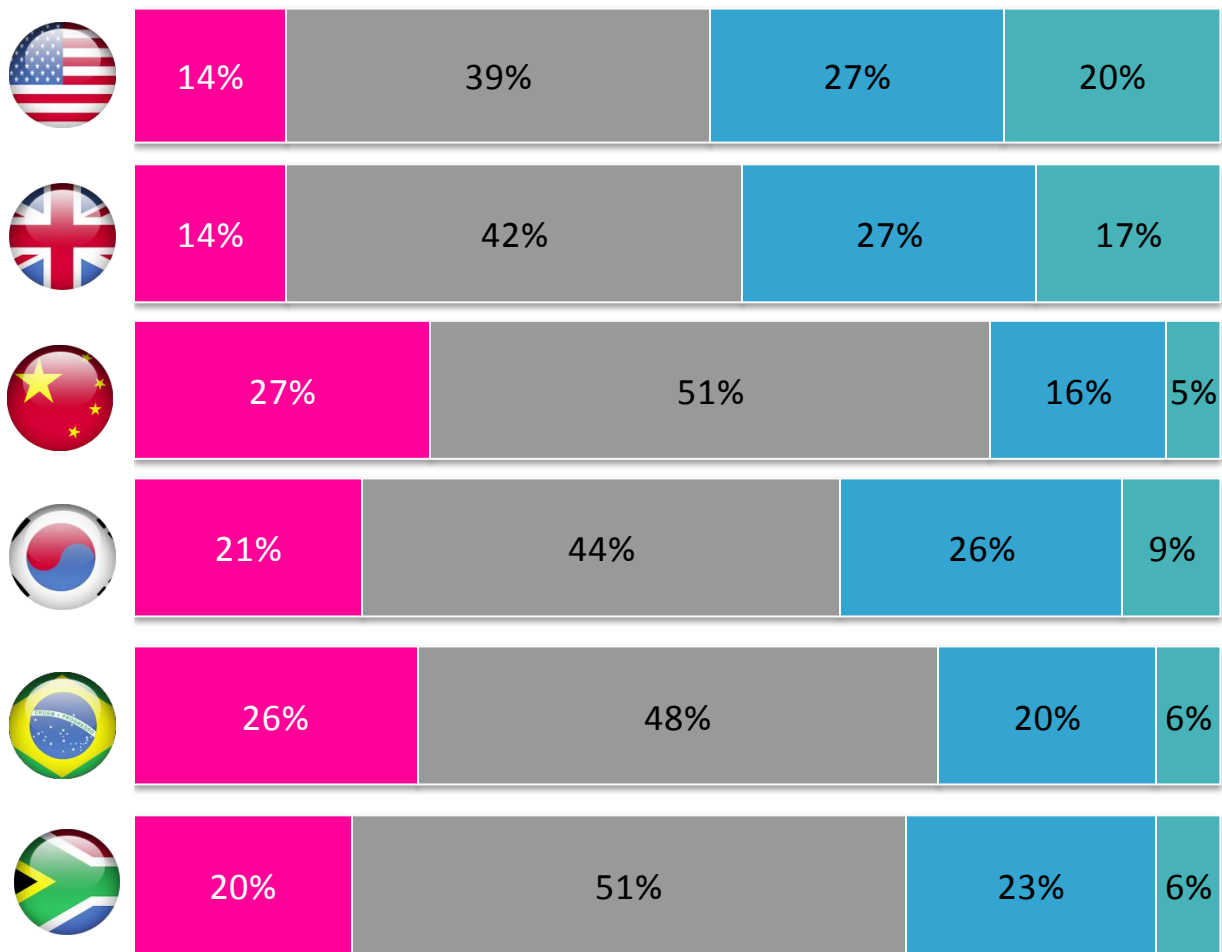


Q16. Some people have suggested that everyone should have a personal “carbon budget.” Which of the following best describes your views on this idea?

Base = all respondents

Across all markets, the majority see the idea of a Carbon Budget as a good idea and would follow it if it was simple. Over a quarter of those in China and Brazil see it as a great idea!

- Great idea- would like to follow a carbon footprint
- Good idea - would follow a budget it simple
- Good idea - don't think would use it
- Not concerned about personal carbon footprint



Summary by country



- The US are within the top 3 countries with young adults who are aware of the term “carbon footprint” yet the majority don’t use it
- However, compared with other countries they are the least concerned about climate change
- The majority claim that they would find information about carbon footprint on product packaging useful or interesting however a quarter would be sceptical about its accuracy
- They are the least likely to follow a personal ‘Carbon Budget’



- Although the awareness of “carbon footprint” is high in the UK, only about half claim to be concerned about climate change.
- Most young adults think the idea of a personal carbon budget is either a great or good idea however most people are willing to use it if it was simple



- Most young adults in China claim to be aware of the term Carbon Footprint however almost a third have never heard about it before.
- Just over half say that information on packaging would influence their purchasing and unlike the other countries, 42% say that they would buy the product even if it cost slightly more
- In addition, they are the most likely to follow a Carbon Budget if it was simple



- South Korea is the country where most young people have not heard of the “carbon footprint” term – with over half claiming they have never heard of it
- However, over half state they are concerned about climate change
- Similar to other countries, the majority would follow a carbon budget – especially if it was simple



- Similar to South Korea, only 60% of those in Brazil claim to have heard of the term “carbon footprint”
- However, they are the most concerned about climate change amongst all the countries
- 63% would find information on packaging useful and would influence purchasing, the highest amongst the six countries



- In South Africa, over a third claim to be aware and use the term “carbon footprint”
- In addition, a fourth are trying to reduce their carbon footprint but say that they could do more.
- Over half claim that information on packaging would influence their purchasing however only if the price was similar to the one without