

What Sustainability Means to Consumers: Media & Entertainment

A brand's guide to consumer attitudes, behaviors and expectations

SEPTEMBER 2022



 Eco-Friendly

Consumers are not paying attention to sustainability in media right now, but companies can still benefit from embracing eco-friendly measures

Sustainability has been a growing concern among companies in the media sector, but whether consumers' worries have grown in lockstep — or at all — is less clear.

To help brand leaders in the entertainment industry with their decision-making, Morning Consult measured and defined consumer attitudes on the matter. We found that sustainability in media is currently not a top priority for most U.S. adults, but select groups, typically younger and more liberal, are paying attention. And of the knowledge that consumers do have about the environment mainly comes from documentaries.

While taking on sustainability initiatives may not immediately move the needle on revenue, taking action can result in production cost savings and potentially even net companies small lifts in viewership on certain titles: More than a quarter of Gen Z adults agreed that they have prioritized watching sustainably made content in the past year. Furthermore, there is demand for more content with sustainability-focused themes, and catering to this demand is a relatively inexpensive way to bulk up content offerings, since doing the same through scripted content is more costly.

Though sustainability efforts will likely be something that consumers prioritize from industries other than media & entertainment, media companies may be held more accountable for their environmental impact as their younger audiences age up and pass on their eco-friendly values to the next generation. Media companies need to ensure they're ready when that happens.



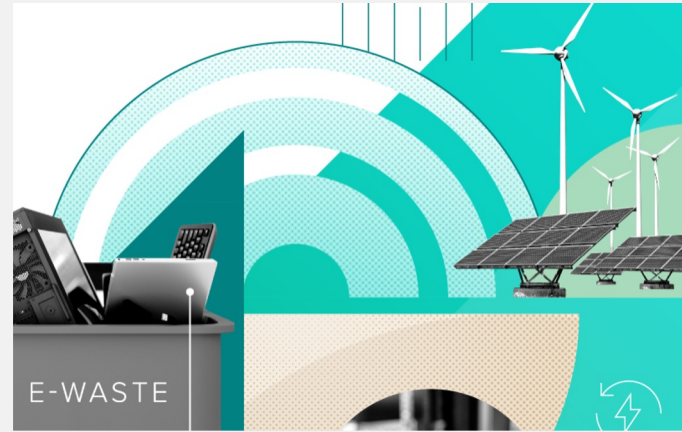
Additional Reading



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While consumerism is inherently not sustainable, retailers can mitigate impact by supporting the resale market, moving toward more recyclable packaging and more.

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First-mover advantage is still on the table for financial services brands when it comes to sustainability.

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Key Takeaways



CONSUMER ATTITUDES

Sustainability is not a major consideration where entertainment is concerned

Most U.S. adults aren't thinking about media companies through the lens of sustainability, likely in part because consumers tend to think about sustainability as it relates to physical products and not services. There's also generally a lack of awareness of the media industry's sustainability efforts.



CONSUMER BEHAVIORS

Documentaries are the genre of choice for sustainability content

Because of a general lack of awareness, consumers don't feel strongly about who should be responsible for creating sustainability-focused content — but of the content they do consume, consumers prefer to absorb sustainability themes through documentaries, more so than film or television.



BRAND ACTIONS

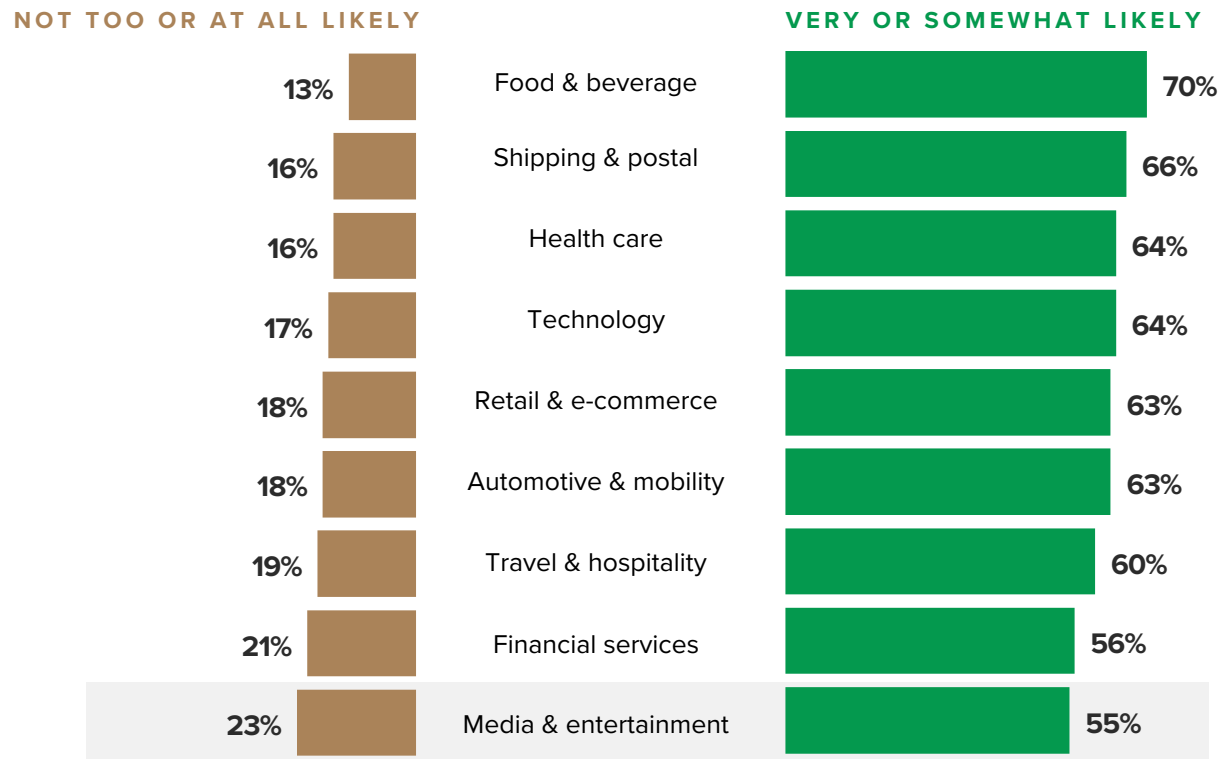
Consumers want companies to run more sustainable productions

Of the facets of media that consumers feel intersect with sustainability, the environmental impact of productions is a top concern among the general public. Companies should focus actions like donating excess food, getting rid of disposable plastics and minimizing carbon emissions from productions.



Media & entertainment ranks low among industries when sustainability is considered

Respondents reported how likely they are to consider purchasing or using a product or service from a company in the following industries if the company prioritized sustainability:



Sustainability is not as important a purchase driver for media & entertainment companies as it is for other industries. Consumers are more likely to be influenced by sustainability if they're interacting with physical products as opposed to services.

Still, sustainability is important for companies such as traditional TV networks and major sports leagues that are looking to age down audiences, with millennials and Gen Z adults are more likely than their older counterparts to say that sustainability would impact their purchase or use of a product or service from a media company.

But even if sustainability is not the most pressing issue for content consumers, sustainability initiatives could help media companies cut costs and retain talent: For example, Netflix noted in its [2021 sustainability report](#) that electric vehicles helped productions both save money and minimize gas emissions, despite their higher rental costs. Meanwhile, allowing employees to work remote more often would not only lessen the energy consumption of a company's headquarters but could also help boost talent retention.

Source: Morning Consult Research Intelligence. "Don't know/No opinion" responses are not shown.



Most are not yet thinking about sustainability when consuming media, but Gen Z stands out

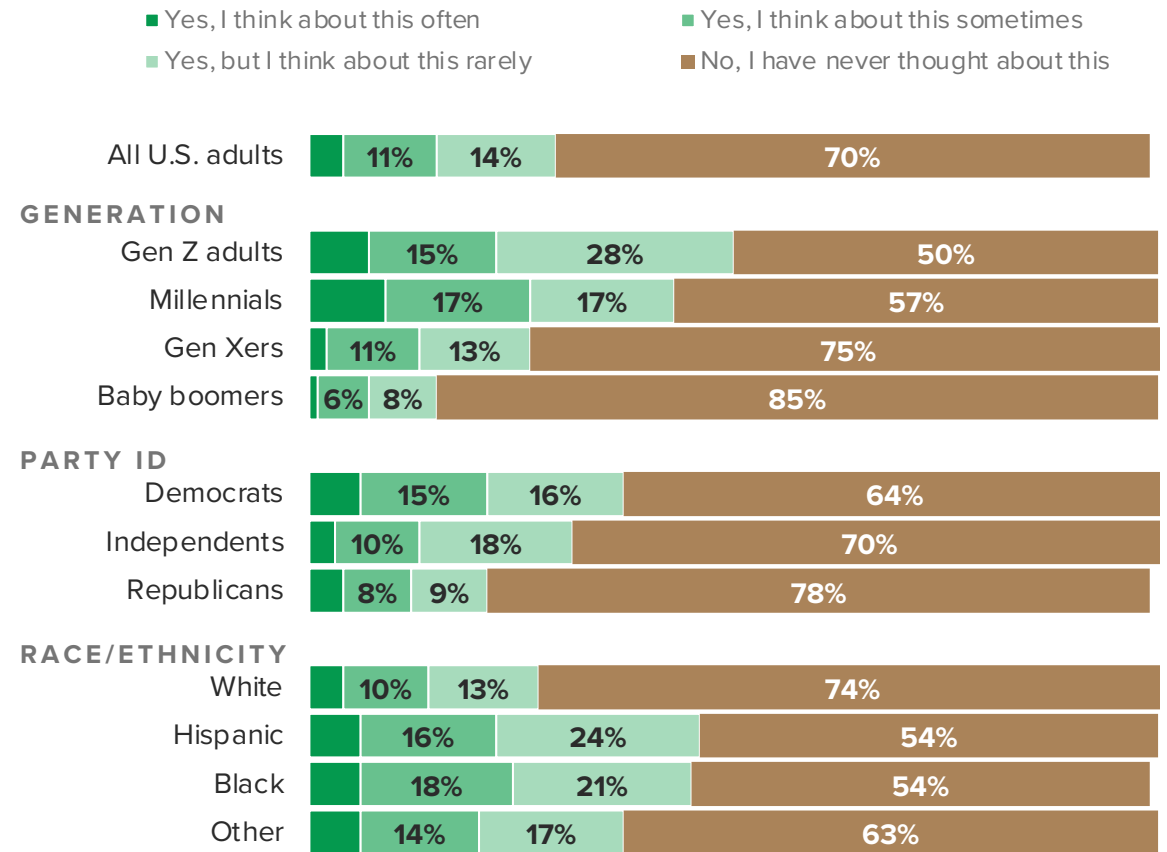
Consumers across major demographic groups very rarely — if ever — think about the sustainability of productions behind TV shows or movies. That stands to reason as it’s also not something that film and television studios intentionally drive a lot of awareness towards.

However, younger generations are more likely than the average adult to at least think about it sometimes, particularly Gen Z adults, who in general are more likely to cite climate change as their top political concern than older generations. Social media platforms, which Gen Z favors as a news source, likely play a big role — Gen Zers are more likely than older generations to engage with climate change-focused social content.

Black and Hispanic Americans are also more likely than the average U.S. adult to live in areas that have been impacted by extreme temperatures, so this is likely more of a concern for those audiences.

With awareness so low, brands have an opportunity to highlight their sustainability efforts on productions if they want to generate more brand loyalty with younger cohorts and minority audiences. Brand messaging should focus on measures taken to minimize the environmental impact of filming and deliver these messages across social platforms after major productions wrap.

Respondents were asked if they thought about the sustainability of a production while watching a TV show or movie

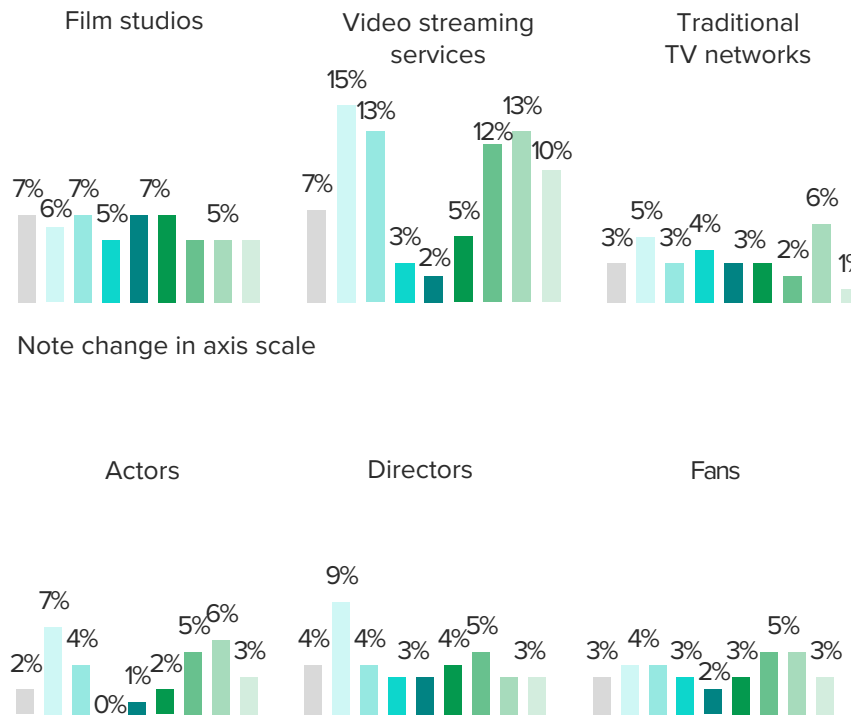
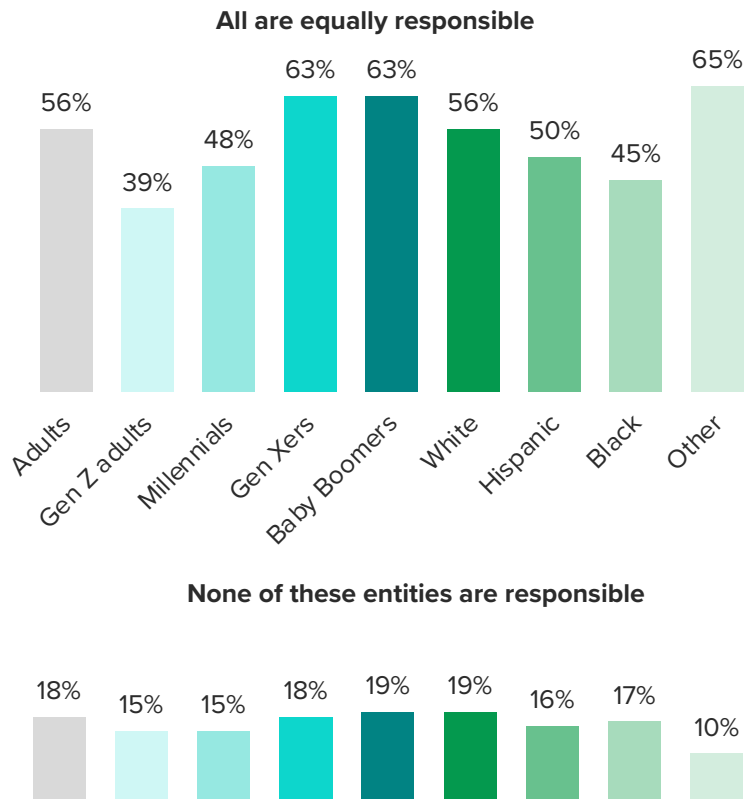


Source: Morning Consult Research Intelligence



Consumers think studios and streamers are the most responsible for creating sustainability content

Share of respondents who said each of the following is most responsible for creating content with sustainability-focused themes:



Because sustainability as a purchase driver is low and many consumers are not thinking about sustainability in media, most U.S. adults didn't single out one party as the most responsible for making content with sustainability themes — 56% of the public said everyone has a part to play.

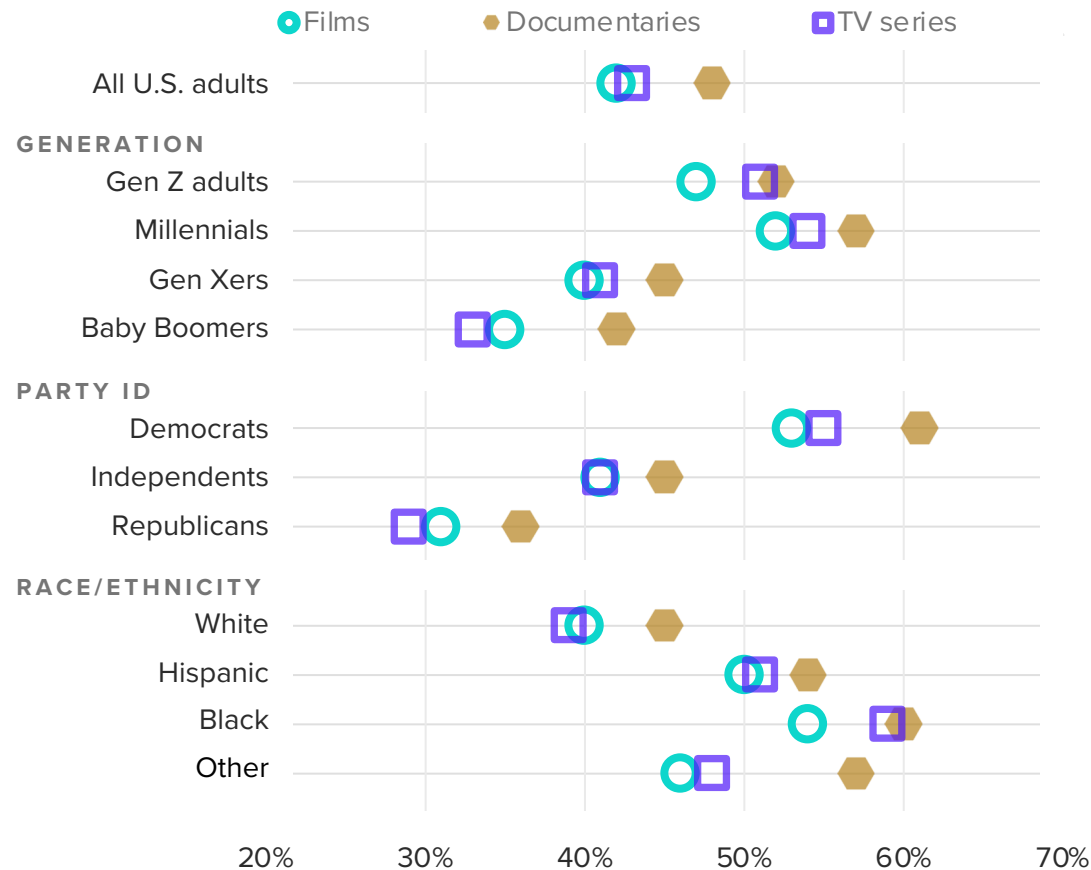
But of those who did point the finger, respondents thought film studios and video streamers bear the most responsibility. Consumers tend to equate climate change-related content with documentaries and films, while others are accustomed to watching this content on streamers.

Source: Morning Consult Research Intelligence



People are most open to getting sustainability messaging through documentaries

Respondents who said they were "very" or "somewhat" interested in the following types of content featuring sustainability-focused themes:



Consumers across the board indicate a preference for seeing sustainability messaging through documentaries, rather than via TV shows or films. This speaks to the history of critically acclaimed documentaries such as the Oscar-winning “An Inconvenient Truth” on global warming effects and “Virunga,” which focused on conservationists’ work to protect mountain gorillas. It also shows that consumers would rather have these themes be overtly communicated to them through nonfiction media, rather than subtly worked into the plots of scripted content.

Even so, just under 4 in 10 U.S. adults said they’ve ever watched a documentary with sustainability-focused themes, which means there’s significant room for video streamers to introduce new viewers to such content.

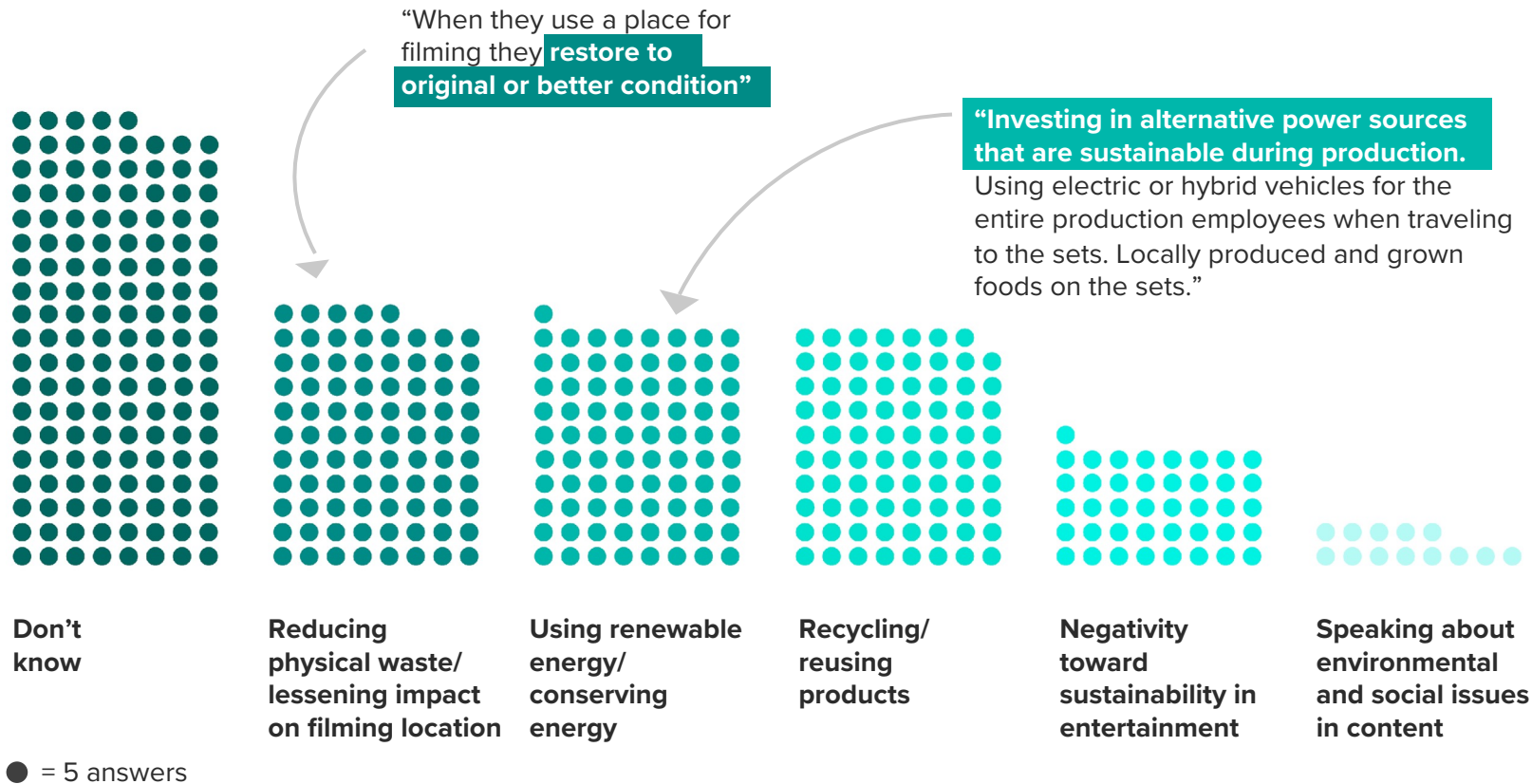
Streamers have an opportunity to bulk up their catalogs with sustainability-focused documentaries, which could help them gain favorability among the more environmentally conscious millennial and Gen Z demos. This should be encouraging to media companies, given unscripted content’s relatively low cost.

Source: Morning Consult Research Intelligence



Consumers associate sustainable media with the tangibility of productions...

Respondents were asked to describe in their own words what it means for an entertainment brand to be sustainable. Below is a summary of common response categories



While a plurality of consumers aren't sure what it means for an entertainment company to be a sustainable brand, through our open-end analysis, we found that those who do have opinions think it involves companies that are reducing physical waste, conserving energy and recycling products. This broadly reflects [our other research](#), which finds that consumers are more likely to think that company actions will make a greater impact on the environment than individual ones.

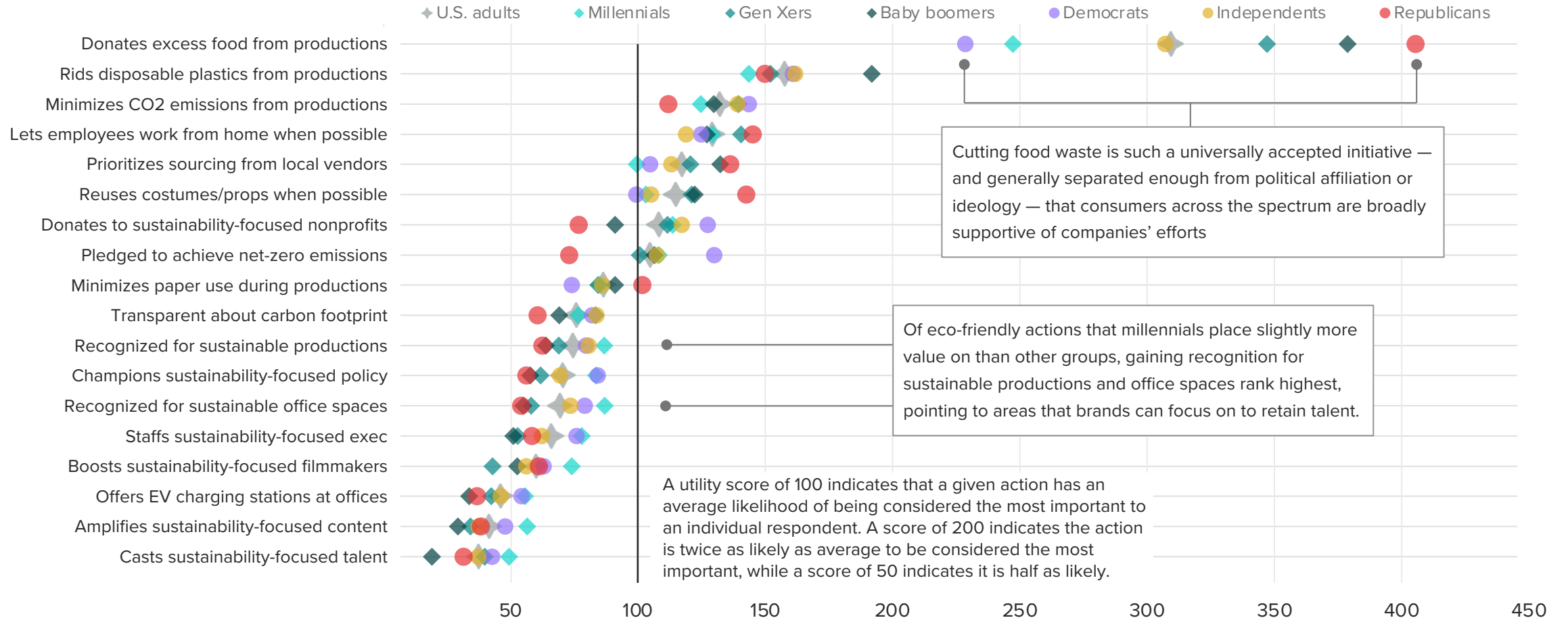
When entertainment brands market their sustainability initiatives, more efforts should be made to promote their eco-friendly efforts on set, which could help boost viewership or engagement from younger audiences: 32% of millennials agreed that they prioritized watching media over the past year that was created sustainably, and 27% of Gen Z adults said the same.

Source: Morning Consult Research Intelligence. “Other” responses are not shown.



...which is why the most important sustainability actions are production-related ones

Respondents were asked how important they thought it was for entertainment companies to take on the following sustainability-focused initiatives. Charted below are the average utility scores, which indicate the relative importance of each attribute across respondents:

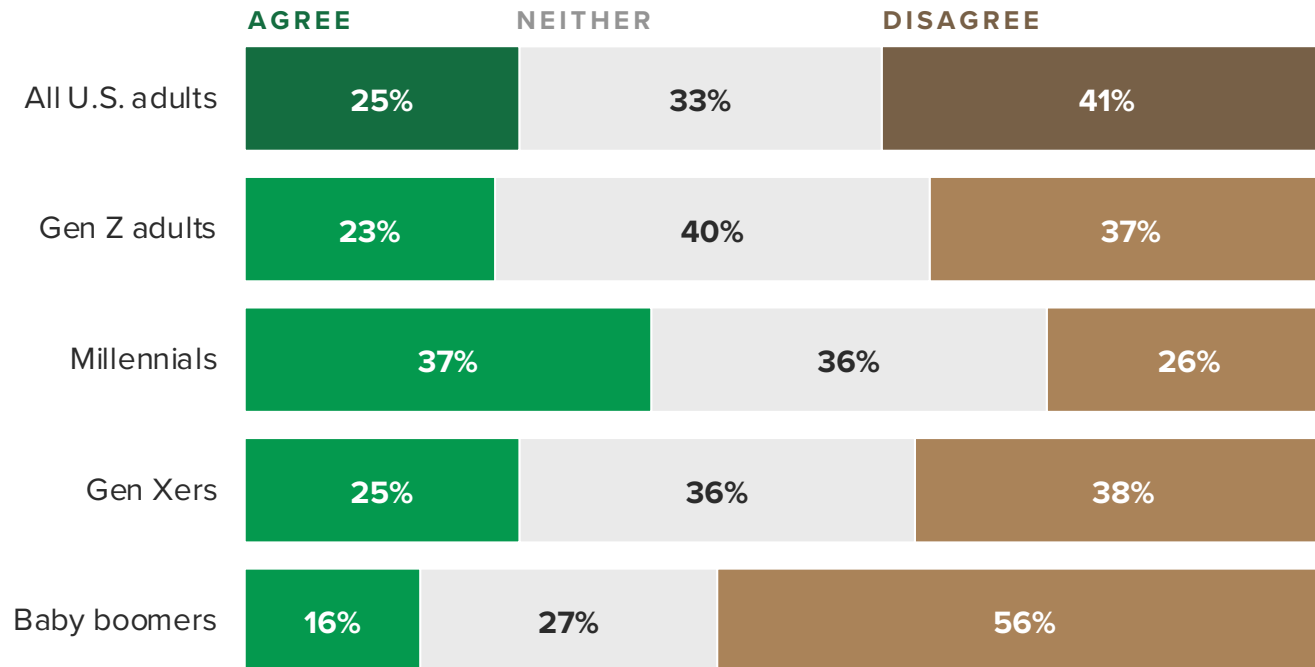


Source: Morning Consult Research Intelligence



The media industry has an opportunity to be more vocal about its sustainability efforts

Shares of respondents who agree or disagree that they know where to learn about media companies' sustainability efforts



Nearly 3 in 4 U.S. adults either disagreed with or have no opinion regarding the idea that media companies are doing enough to operate sustainably, which likely correlates with the 41% plurality who disagreed that they know where to find information about companies' sustainability initiatives.

Companies can directly emphasize their efforts to audiences already interested in combating climate change, such as by sponsoring sustainability-focused influencers who can then spread the word on their own platforms.

Video streamers like Netflix and Hulu could also more prominently promote their sustainability-focused initiatives and content on the product pages of the eco-friendly goods (like reusable cups and tote bags) they're already selling. This would be a very unobtrusive way for streamers to build awareness of their sustainability pushes.

Media companies can't be complacent about sustainability

Even though consumers indicate that the sustainability of a media company is not a top concern, the near-term potential for cost savings alone should be enough to help sway a certain entertainment brand to act in a more environmentally conscious manner.

There's a wide range of cost savings a production could see from minimizing its carbon footprint, which can be notable: Doug Belgrad, former president of Sony Pictures' Motion Picture Group, estimated that sustainability measures — reducing water waste and saving materials for reuse in future productions — enacted on the set of "The Amazing Spider-Man 2" helped save over \$400,000. Colleen Bell, executive director of the California's agency aimed at boosting in-state media production, [said](#) that implementing more fuel-efficient practices may mean initial capital investment, "but inevitably reduces bottom-line costs in the long run."

But more importantly, the media & entertainment industry should keep in mind that consumers' expectations of sustainability in the sector may be low now, but that will likely change over the next decade.

While media & entertainment may never top the list of industries where sustainability is important for consumers, broad public interest in sustainability will likely rise in the years to come. It's in media & entertainment companies' best interest to start boosting eco-friendly measures now so that they are not caught flat-footed when the younger generations become the loudest in their sustainability expectations.

So: While embracing sustainability won't be a quick revenue needle-mover, it could still result in brand building among younger demos to drive a meaningful business boost in the aggregate.

About the Report & Methodology

The “What Sustainability Means to Consumers” project unpacks consumer attitudes and behaviors connected to sustainability, in addition to identifying what sustainable actions consumers expect from the brands they purchase from. Visit our [sustainability portal](#) to explore and download all the research in this project.

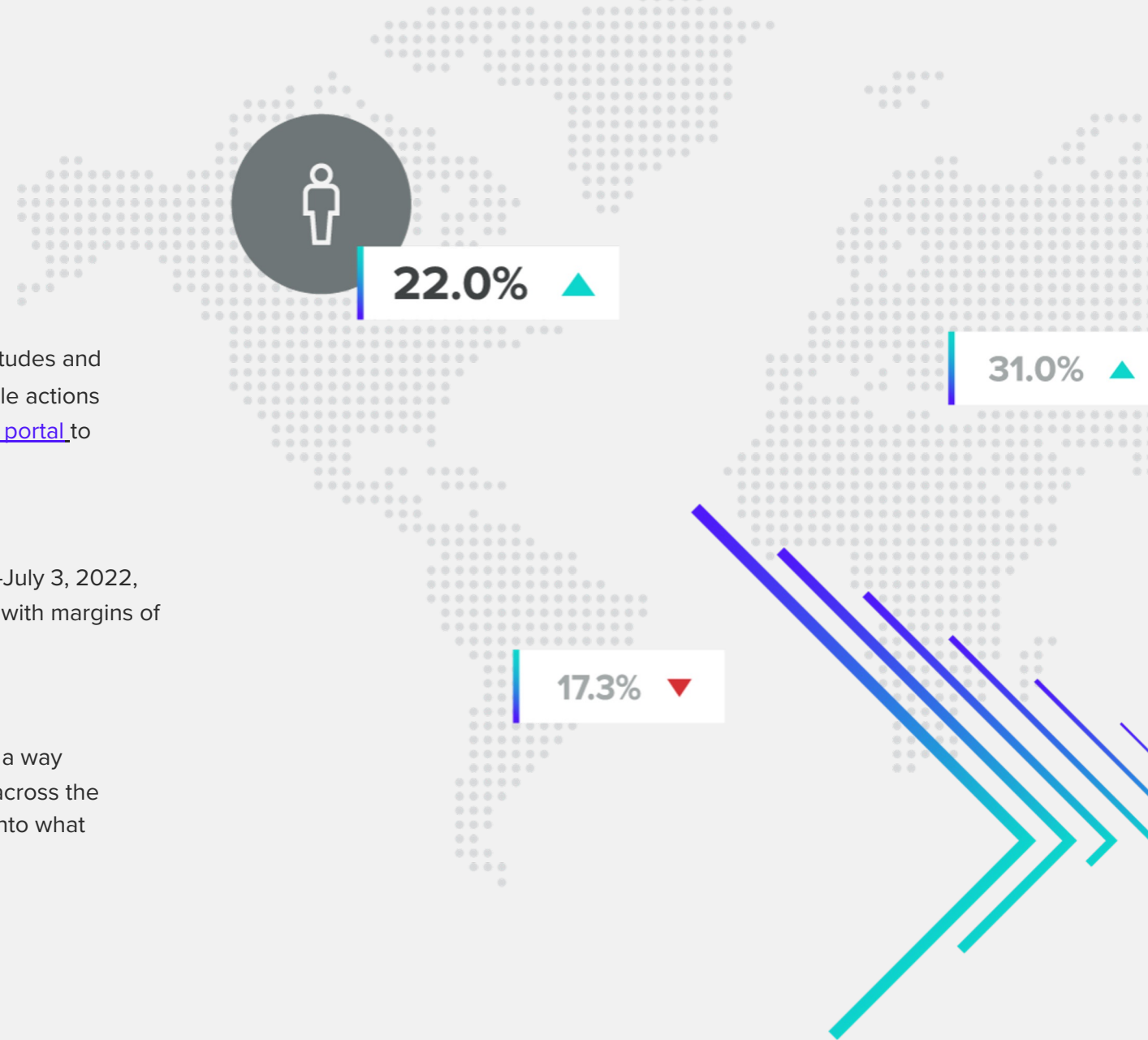
Methodology

The analysis behind this report is drawn from two surveys conducted June 30-July 3, 2022, and July 3-5, 2022, among a representative sample of 2,210 U.S. adults each, with margins of error of plus or minus 2 percentage points.

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Kevin Tran is the media and entertainment analyst at global intelligence company Morning Consult. He heads Morning Consult's efforts to deliver real-time insights for leaders in the media sector.

Prior to joining Morning Consult, Kevin was a media analyst for Variety Intelligence Platform, Variety's premium subscription service. Before Variety, Kevin was a digital media research associate at Business Insider Intelligence, which has since rebranded to Insider Intelligence. Kevin graduated from U.C. Berkeley's Haas School of Business and currently resides in Los Angeles, Calif.



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