WORLD ECONOMIC FORUM

In Partnership with SAP + qualtrics XM

The Climate Progress Survey:
Business & Consumer Worries & Hopes

A Global Study of Public Opinion

Table of Contents

1 Background & Methodology

Background & Methodology

Qualtrics, SAP & WEF have partnered on research regularly over the course of the past 3 years, taking a global pulse to assess consumer sentiments for a variety of topics. In Fall 2021, we partnered on an initiative that more broadly addressed sustainability, the role and degree of influence that individual consumers, businesses and governments have in making sustained progress.

Audience

11,686 global responses were collected between the dates of 8/10/21 - 9/20/21.

For the topics of **sustainability** and **climate change**, it was important to get representation from both consumer and corporate respondents.

As such **70%** of our response population (n=8,215) represented perspectives of **general consumers**, while the remaining **30%** of the audience reflected perceptions of **corporate respondents** (n=3,471).

All respondents were:

- *18-90 years old*
- *Corporate respondents work 40+ hours per week for for-profit companies*

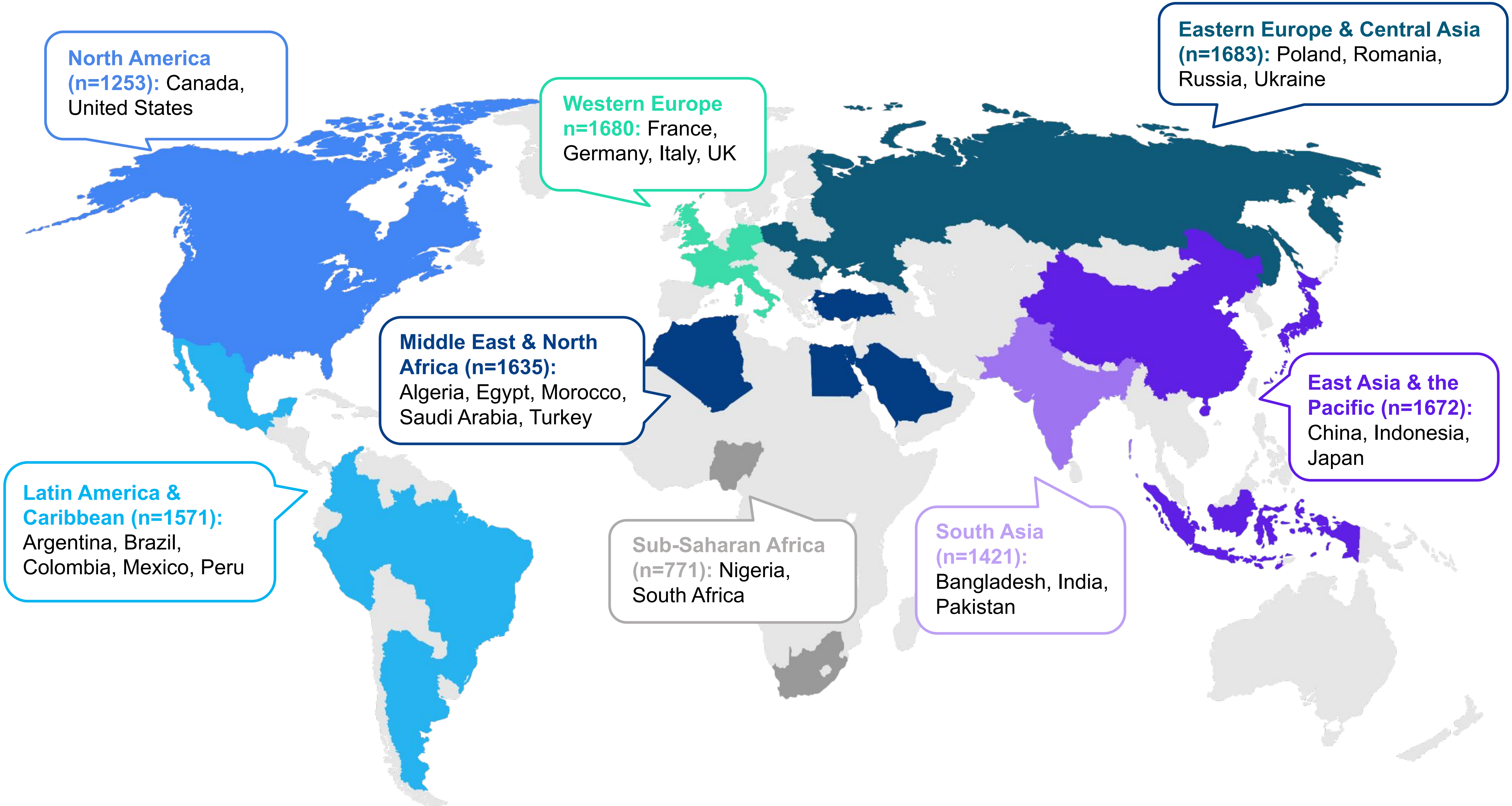
NOTE: Data presented in this report is broken out regionally, with statistical comparisons made against Global results.

Research Topics

- **Employment**:
  Type, industry, role, hours, influence
- **News exposure**:
  Current events, degree of trust, climate-related
- **Climate Science & Global Warming**:
  Trust, belief, importance, progress, optimism, pandemic impact
- **Environmental & Policy**:
  Laws, regulations, key issues
- **Individual Actions & Challenges**:
  Responsibility, impact, concern, recycling, plastics
- **Business Actions & Challenges**:
  Responsibility, trust, impact, tax, optimism, progress, risk, obstacles
- **Climate Superhero**

Global Reach

This study targeted 8 regions globally across 28 countries.



XM

Guide to Interpretation

qualtrics XM + SAP

Global Results

Total results for each question are first presented at the global level to demonstrate perceptions around the world.

Regional Results

Data is then cut on a regional level to better understand cultural nuances while mitigating country-specific biases.

Comparing Results

Throughout the report, regional results are compared to global averages to highlight meaningful differences.

Results should only be compared by region vs. global rather than region vs. region.

Overall Trends

When reviewing the data question-by-question, keep in mind the macro trends noted in the key findings section.

2 Key Findings

Global Key Findings

qualtrics XM + SAP

Existence

While around the world **climate change** is mostly viewed as a **human-caused** phenomenon, even more consumers consider it highly **important** to **address**. However, **optimism** about the ability to **reduce emissions varies** wildly by region: **South Asian** respondents are more than **2X** as likely to feel **optimistic** than **Western European** respondents.

Approach

The great majority of global communities find it **important** for **countries** to **work together** to address climate change. **Only** about a **third** of respondents believe the **environment** should be given **priority over** the **economy**, but most favor policies that tax business that excessively pollute. **Renewable energy** solutions are among the top priorities that **both world** and **business** leaders should focus on addressing.

Governance

Climate change poses a major **risk** to **half** of **organizations** surveyed, although **North American** companies cite significantly **lower risk** than the global average. As executives consider how to mitigate risk, they should note that Environmental, Social, and Governance (**ESG**) metrics increase **positive opinions** of companies for more than **2-in-3** corporate respondents, and **half** of **organizations** that employ ESG metrics find them extremely or very **useful**.

Solutions

Results from this study clearly demonstrate the high importance of both **countries** and **corporations addressing** the **climate crisis**, especially when it comes to **renewable resources** that can help **improve air quality** and **reduce pollution**. That said, **positive** vs. **negative** sentiment about climate **progress** can often be divided by **regional perspectives**, as evidenced by more region-specific findings in the following pages.

Key Findings by Region

WESTERN EUROPE

Western Europeans tend to reflect more **negative** perceptions on climate change: only **31%** are **optimistic** about **progress** toward reducing emissions and just **33%** of those who use ESG metrics find them extremely or very useful, the lowest of all regions. A slim majority (**59%**) think of themselves as **personally responsible** for addressing climate change. **Two-thirds** of respondents in Western Europe **trust** what **scientists** say about the environment and around **4-in-5** believe that climate change is mostly **human-caused**. Among corporate respondents, less than **half** say that climate change poses a top or major **risk** to their **organization**.

EASTERN EUROPE & CENTRAL ASIA

Similar to Western Europe, respondents in **Eastern Europe & Central Asia** tend to be more negative: just **40**% are **optimistic** about emission reduction, and respondents in the region come in last place for feeling extremely or very responsible for addressing climate change as individuals (**50%**). Around **two-thirds trust** what **scientists** say about the environment, and over **3-in-4** believe that climate change is mostly **human-caused**. Only **39%** cite **climate change** as a top or major **risk** to their organization and find **ESG metrics** extremely or very **useful**.

SOUTH ASIA

In direct opposition to Europe, those in **South Asia** tend to be more **positive** and lead on key metrics. Respondents in this region rank highest for feeling extremely or very **responsible** as an individual to take action (**84%**), **trusting** what **scientists** say about the environment (**84%**), being **optimistic** about progress made toward climate goals (**76%**), and finding **ESG** metrics extremely or very **useful** (**71%**). However, they also face the highest **risk** from climate change as **corporate** organizations (**66%**). **Three-fourths** of South Asian respondents believe climate change to be mostly **human-caused**.

EAST ASIA & THE PACIFIC

Around **half** of corporate respondents in **East Asia & the Pacific** claim that climate change poses a top or major **risk** to their **organization**, and **slightly less** than that find **ESG** metrics to be extremely or very **useful** to their business. **2-in-3** respondents believe that climate change is **human-caused** (the lowest of any region), and less than **3-in-5 trust** what **scientists** say about the environment. **56%** are **optimistic** about reducing emissions and **57%** feel extremely or very **personally responsible** to address climate change.

Key Findings by Region, cont'd...

qualtrics XM + SAP

MIDDLE EAST & NORTH AFRICA

Respondents in the **Middle East & North Africa** are fairly **neutral** compared to other regions as they neither lead nor lag on any major KPI. **71% trust scientists**, believe climate change is mostly **human-caused** and feel extremely or very **personally responsible** for addressing climate change. Around **half** are **optimistic** about the progress needed to reduce emissions. Among corporate respondents, **53%** face notable **risk** from climate change and **59%** of those who use **ESG** metrics they they are extremely or very **useful**.

SUB-SAHARAN AFRICA

Similar to MENA, **Sub-Saharan African** respondents tend to fall in the **middle** of most key metrics. Around **7-in-10** feel **responsible** to address climate change as **individuals**, believe climate change is mostly **human-caused**, and **trust scientists**. **61%** remain **optimistic** about progress being made toward reducing emissions that accelerate climate change. **6-in-10** corporate respondents who use **ESG** metrics find them extremely or very **useful**, and **2-in-5** think climate change poses a major or top **risk**.

LATIN AMERICA & CARIBBEAN

Latin America & the Caribbean leads on the percentage of respondents who believe climate change is mostly **human-caused** (**84%**). **71%** also **trust** what scientists say about the climate and **72%** feel extremely or very personally **responsible** to address it as an individual. However, only about **half** are **optimistic** about progress being made. Corporate respondents in LAC are the second most likely to face climate challenges, with **62%** citing climate change as a major or top **risk**. **55%** of those who use **ESG** metrics find them extremely or very **useful**.

NORTH AMERICA

North American respondents tend to be more **skeptical** compared to other regions**.** They rank the lowest for **trusting** what **scientists** say about the environment (**58%**) and facing climate change **risks as businesses** (**34%**), and they rank second-lowest for believing climate change is mostly **human-caused** (**66%**). **Half** feel **responsible** as individuals to address climate change, and just **40%** are **optimistic** about reducing emissions. **Less than half** of corporate respondents who use **ESG** metrics think they are extremely or very **useful**.

3

Personal Perceptions of Climate Change

Climate KPI Summary

qualtrics XM + SAP

Most global communities believe that climate change is the result of human activity and that it's important to address climate change as a global issue. Although not a vast majority, more respondents than not trust in environmental science. When it comes to optimism around the ability to reduce emissions, sentiment varies wildly per region.

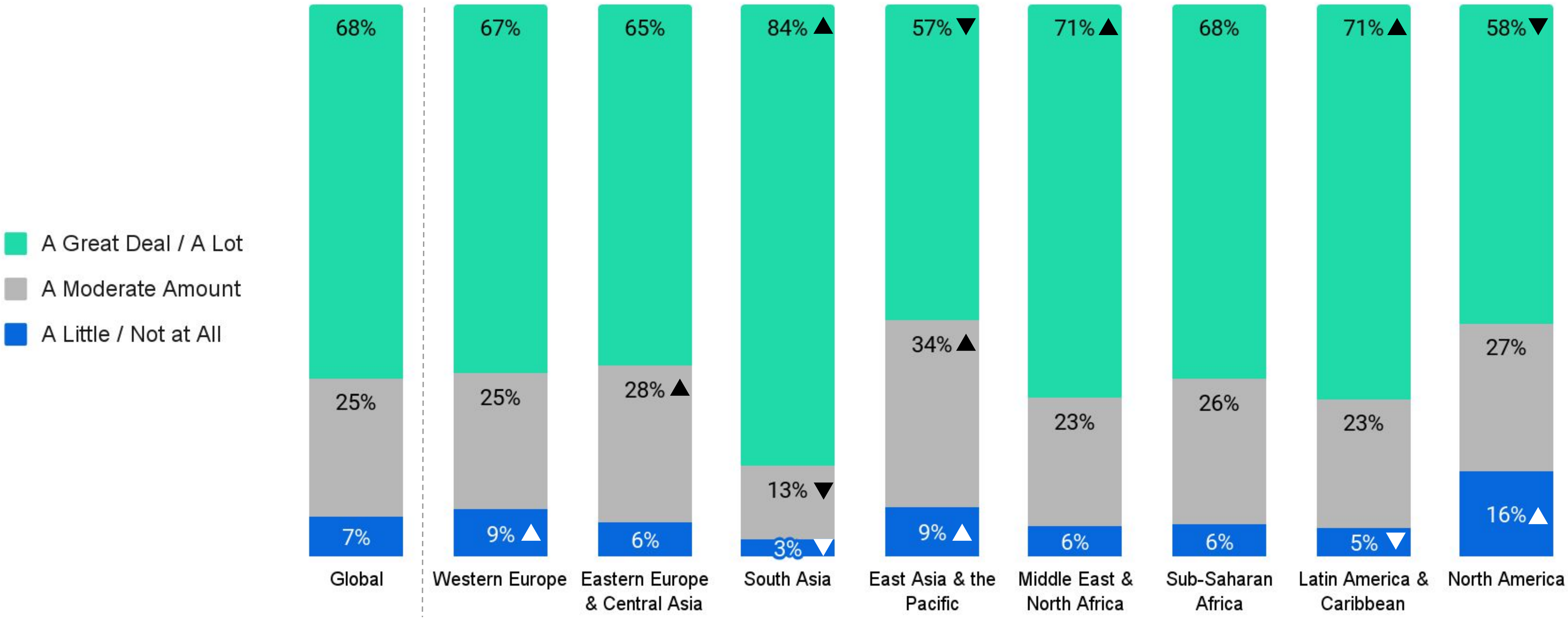
	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Trust What **Scientists** Say about the **Environment** a Great Deal or a Lot	68%	67%	65%	84%	57%	71%	68%	71%	58%
Believe **Climate Change** is Caused Mostly by **Human Activity**	74%	79%	76%	75%	66%	71%	71%	84%	67%
Extremely/Very Important to **Address Climate Change**	85%	87%	79%	91%	72%	86%	93%	92%	77%
Extremely/Somewhat **Optimistic** about **Reducing Emissions** within **20 Years**	50%	31%	40%	76%	56%	52%	61%	52%	40%
Extremely/Very **Responsible** for **Addressing Climate Change** Individually	64%	59%	50%	84%	57%	71%	72%	72%	51%

/ indicates highest/lowest KPI score across regions

Green/Red text indicates statistical significance compared to Global results at 95% confidence level

Trust in Climate Science

South Asian respondents have the highest level of trust in what scientists say about the environment, closely followed by MENA and LAC. Respondents in East Asia & the Pacific and North America are significantly less trusting compared to global results.

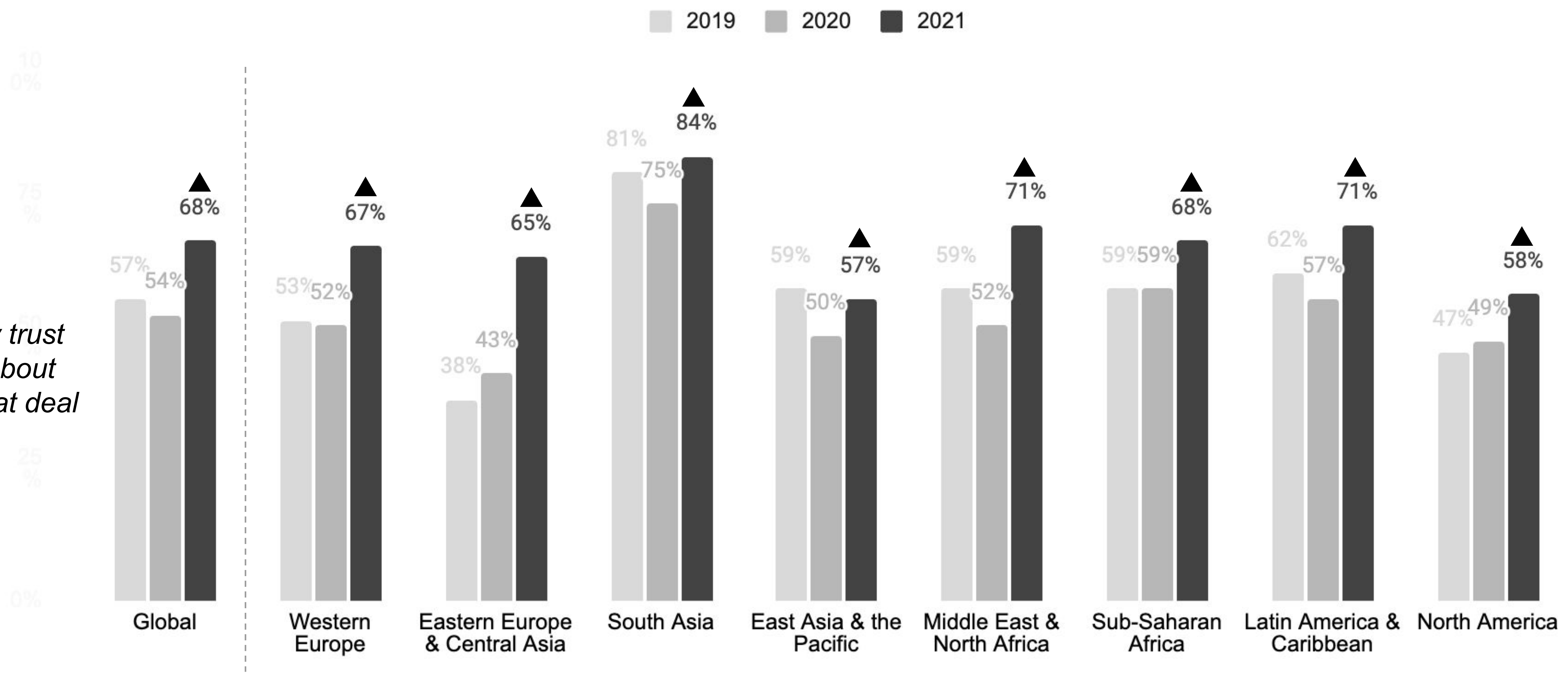


Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Trust in Climate Science

Globally, trust in science has increased significantly year-over-year, driven in large part by European regions, MENA, Sub-Saharan Africa, LAC and North America. In few regions, the 2021 results exhibit a return to 2019 levels (namely South and East Asia).

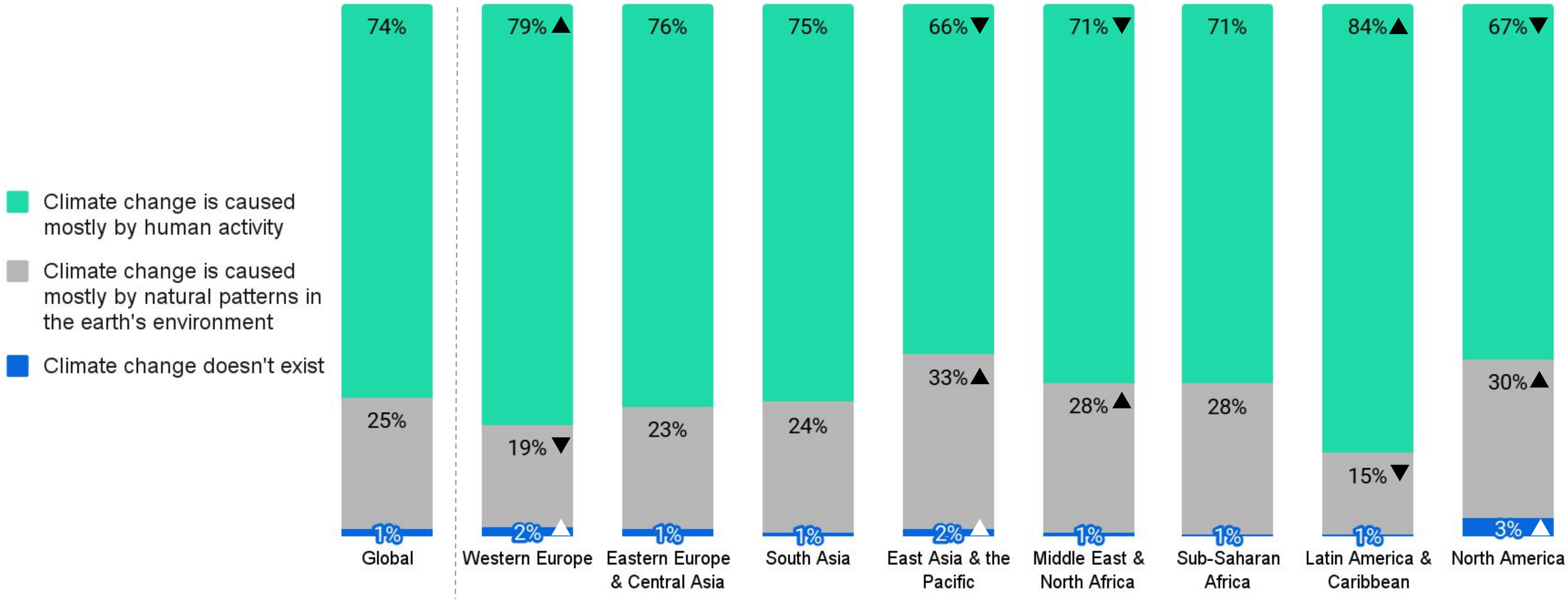
% indicating that they trust what scientists say about the environment a great deal or a lot



Statistically significant differences vs. 2020 at 95% CI indicated by ▲▼ symbols

Belief in Climate Change

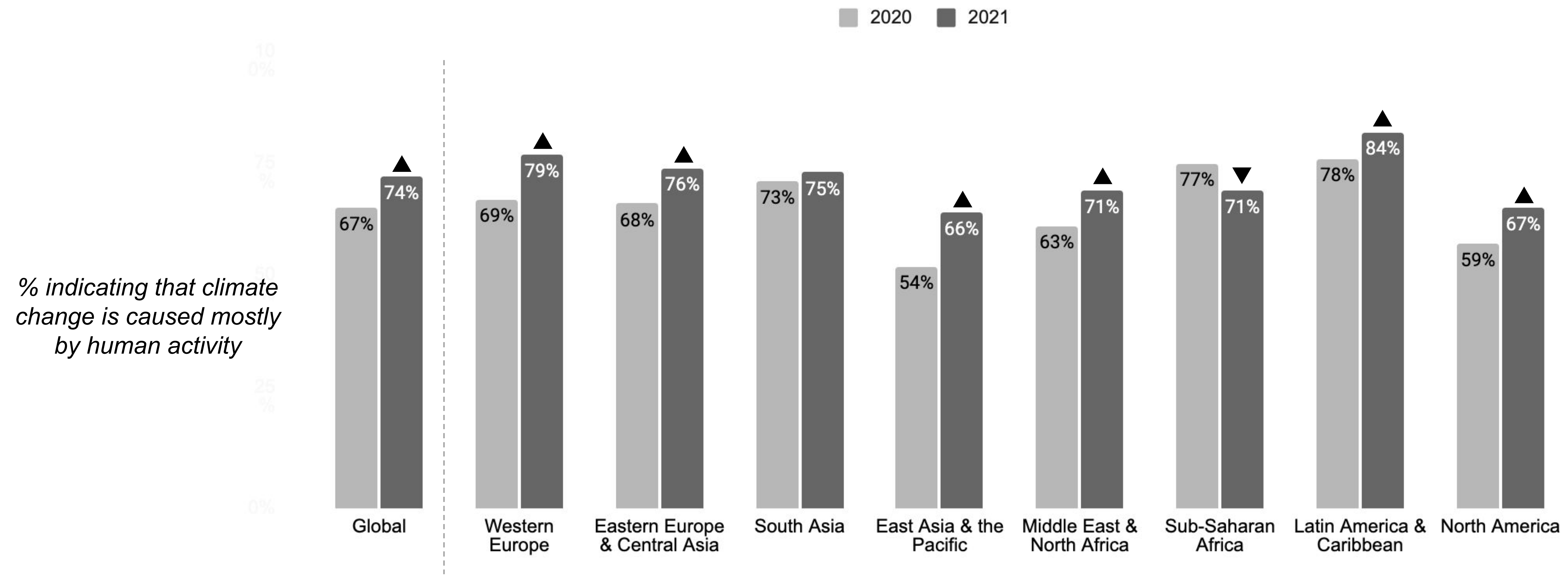
At least two-thirds of respondents in every region believe that climate change is mostly caused by human activity. However, around one-in-three respondents in East Asia & the Pacific and North America believe it is mostly caused by natural environmental patterns.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Belief in Climate Change

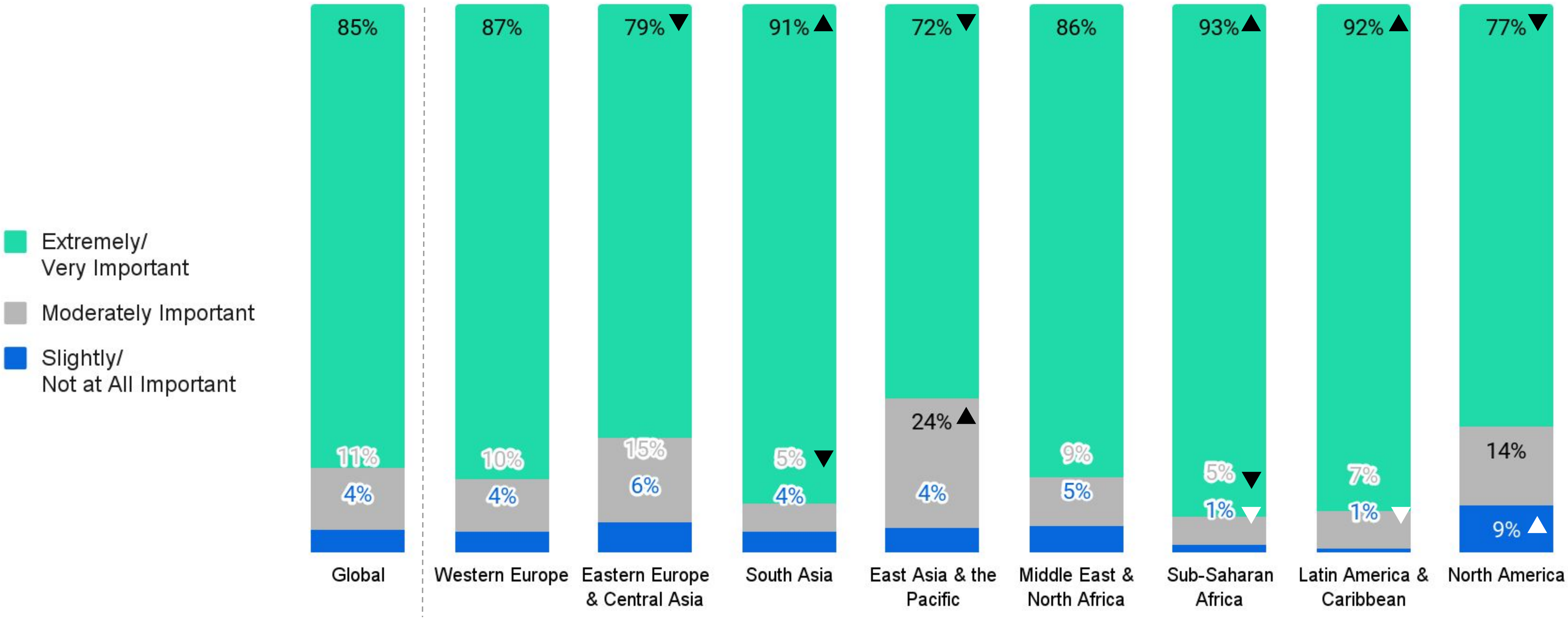
Globally, more consumers in 2021 believe that climate change is human-caused than in 2020 (+ 7% points). East Asia, European regions, and North America contribute favorably to this increase. Sub-Saharan Africa demonstrates a significant retraction in this belief.



Statistically significant differences vs. 2020 at 95% CI indicated by ▲▼ symbols

Importance of Addressing Climate Change

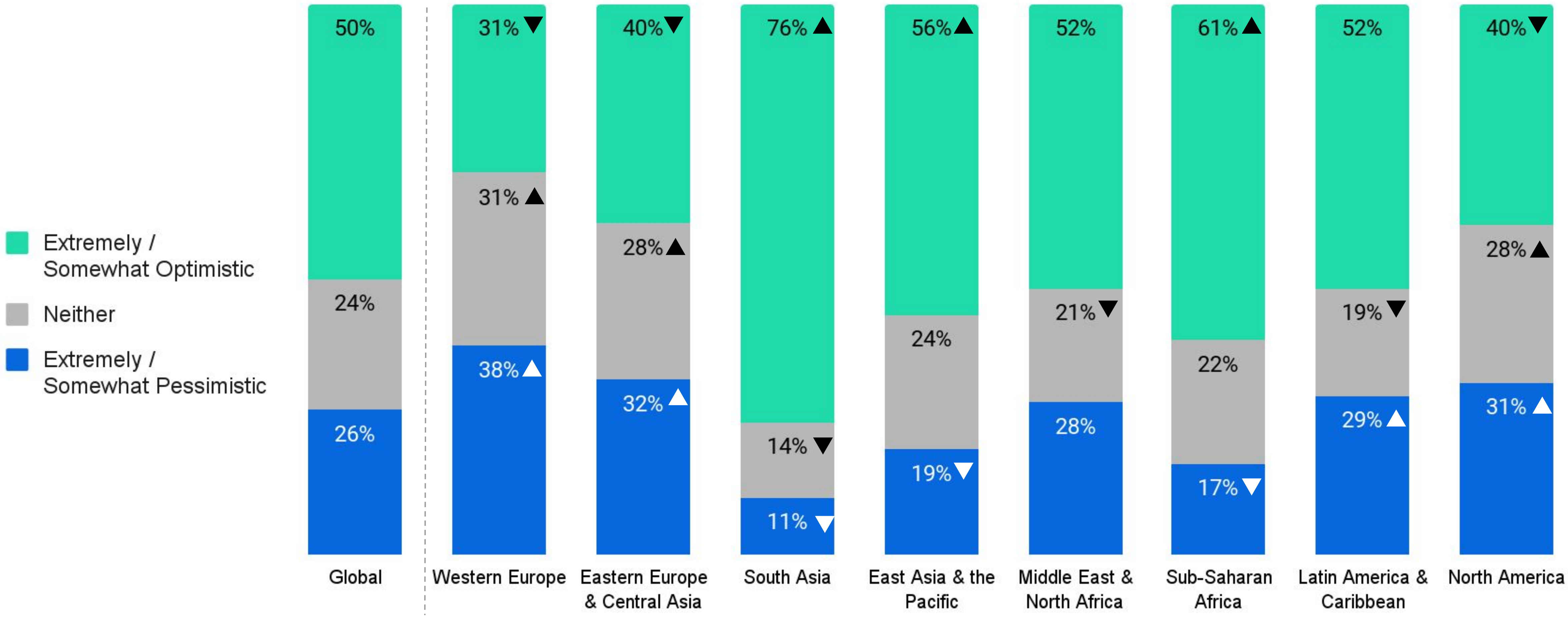
While nearly a three-fourths majority believe that it is extremely or very important to address climate change across all regions, Eastern Europe & Central Asia, East Asia & the Pacific and North America fall significantly behind global for the sentiment.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Optimism about Emission Reduction

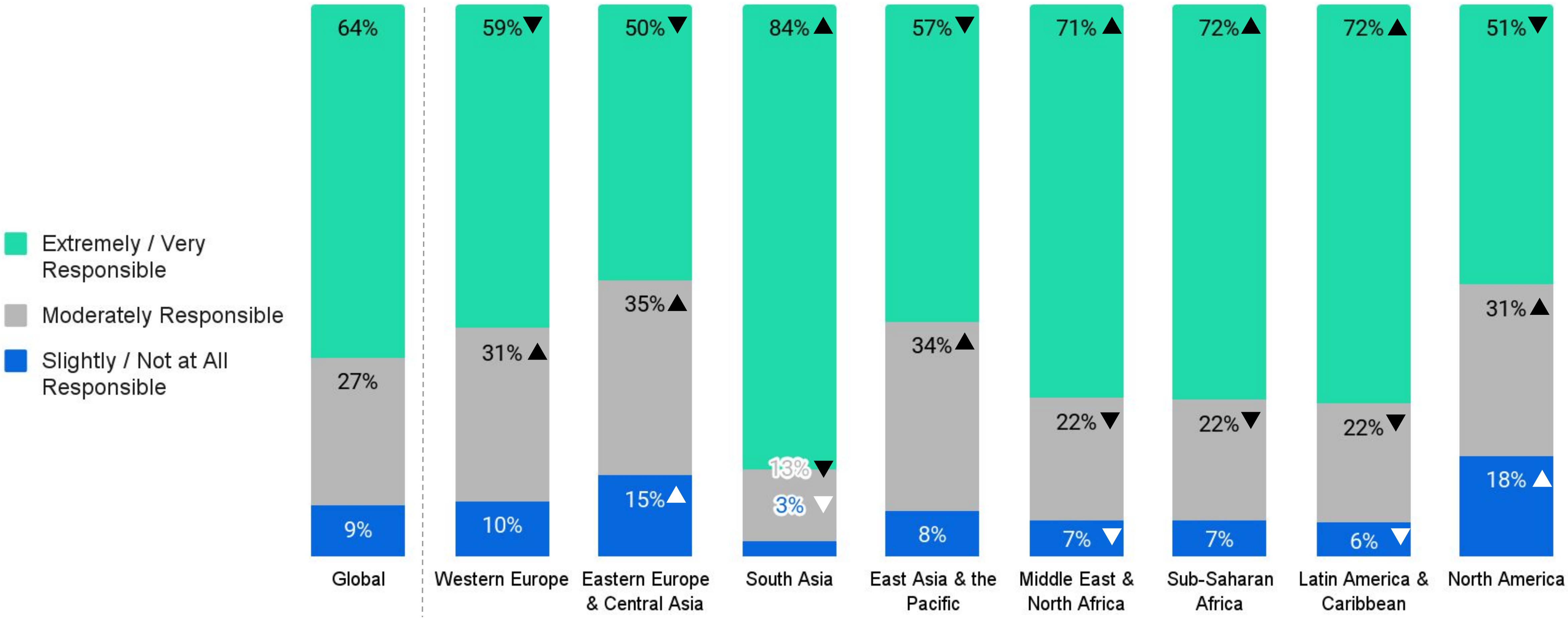
Global markets reflect mixed optimism about reducing emissions within the next 20 years. South Asia is the most optimistic, while just over half in Sub-Saharan Africa and East Asia & the Pacific share in optimism. A majority in Western Europe, Eastern Europe and North America share more neutral pessimism about progress being made.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Individual Responsibility

The vast majority of South Asian respondents feel extremely or very responsible for taking action to address climate change as individuals. Only half of Eastern European & Central Asian and North American respondents share this sentiment. Respondents across the Middle East & North Africa, Sub-Saharan Africa and Latin America & the Caribbean share similar views on individual responsibility to address climate change.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

4 Role of Government in Climate Change

Government KPI Summary

Most global communities believe that it is at least very important for countries to work together to address climate change with Renewable Energy solutions and Air pollution being the most important sustainability issues to focus on. Only about a third of respondents believe the environment should be given priority over the economy, but favor policies that tax business that excessively pollute. When it comes to believing their country is prepared to address global crises post-COVID, sentiment varies per region.

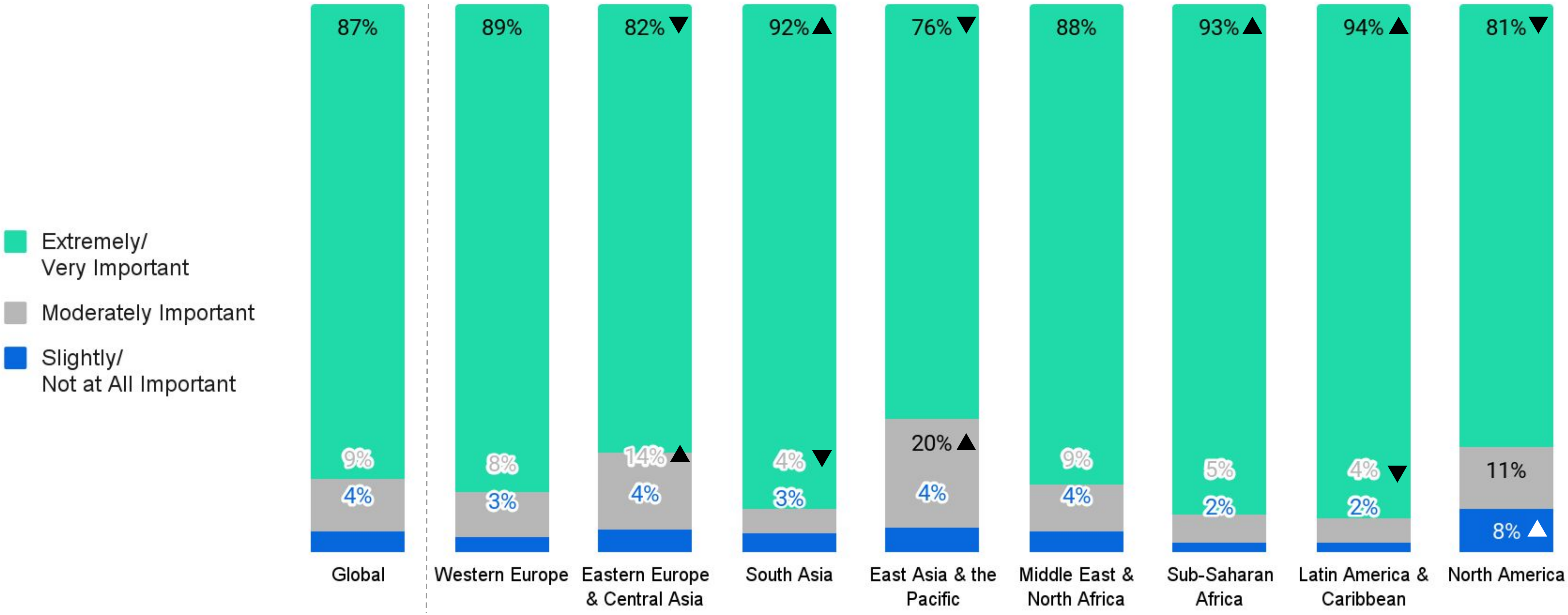
	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Extremely/Very **Important** for Countries to **Work Together** to **Address** Climate Change	87%	89%	82%	92%	76%	88%	93%	94%	81%
Government is Doing **Too Little** to Protect the **Environment**	59%	71%	76%	41%	41%	41%	79%	69%	59%
The **Environment** Should be Given Priority even if it **Slows** Down the **Economy**	34%	38%	26%	38%	37%	41%	22%	28%	34%
Favor Strongly/Somewhat **Policies** that put **Taxes** on Businesses that Pollute	79%	74%	81%	81%	80%	84%	76%	84%	69%
Most **Important Climate-related** Issue	Air Pollution	**Renewable Energy Solutions**	Air Pollution	Air Pollution	Air Pollution	**Renewable Energy Solutions**	**Renewable Energy Solutions**	**Renewable Energy Solutions**	**Renewable Energy Solutions**
Country is Extremely/Very **Prepared** to Address **Global Crises** based on COVID Response	28%	17%	11%	52%	49%	40%	18%	13%	23%

/ indicates highest/lowest KPI score across regions

Green/Red text indicates statistical significance compared to Global results at 95% confidence level

Importance of Countries Addressing Climate Change

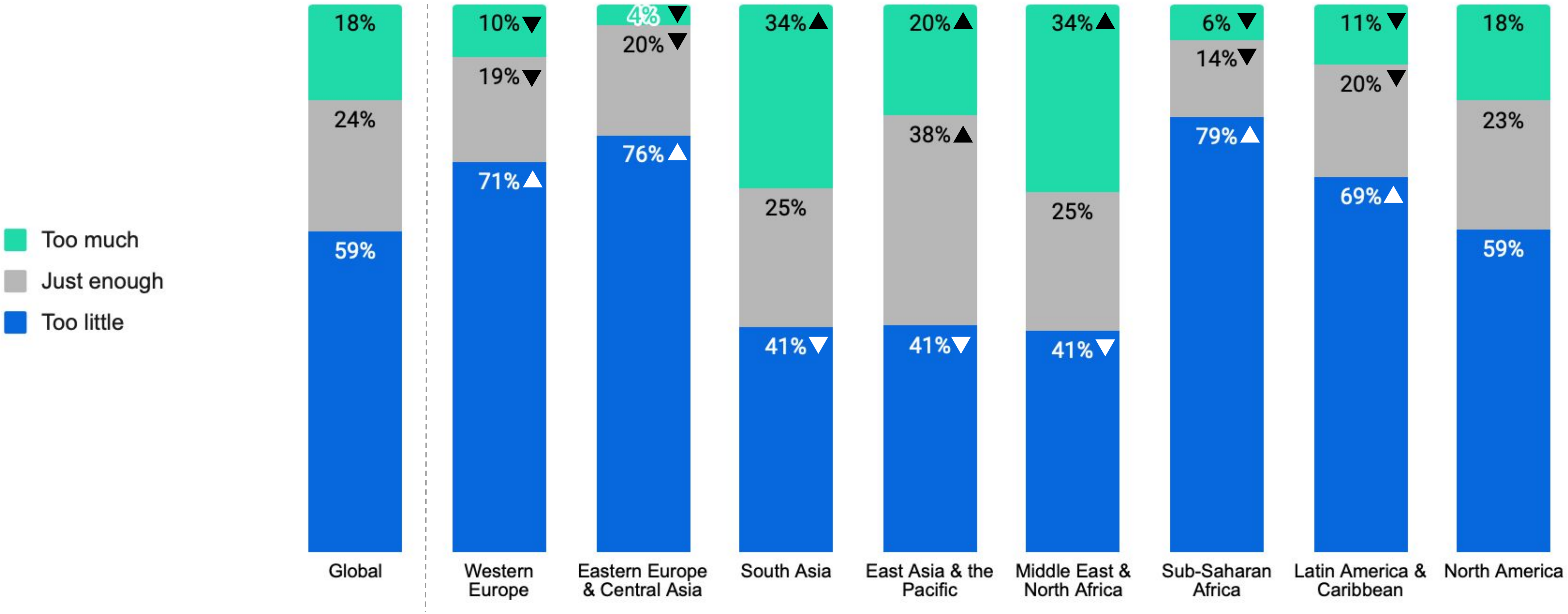
Generally, markets find it important to work together to address climate change. North American respondents are the only region to indicate statistically significantly higher levels of people saying that they do not think this goal is important when compared globally.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Laws & Regulations to Protect Environment

More than half of respondents agree that their government does not do enough to protect the environment, with the exception of South Asia, East Asia & the Pacific and Middle East & North Africa which see significantly higher levels of respondents agreeing that laws and regulations do "too much" in their country.

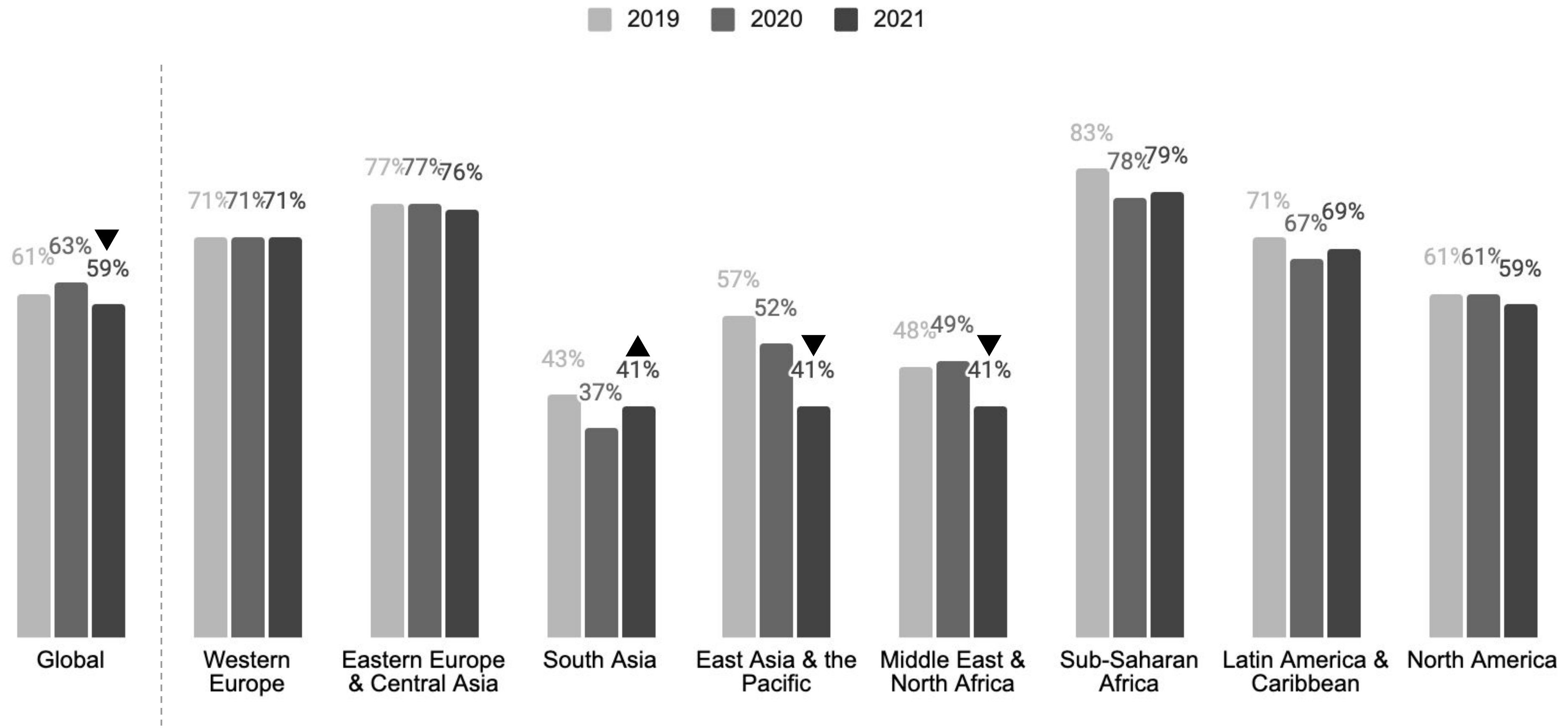


Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Laws & Regulations to Protect Environment

Globally, there has been little progress on governments' actions to protect the environment (4%pts fewer consumers believe their government is doing too little). European and American regions hold flat, while East Asia and MENA exhibit significantly more favorable opinions of their governments. South Asia and Sub-Saharan Africa indicate directional worsening of government involvement.

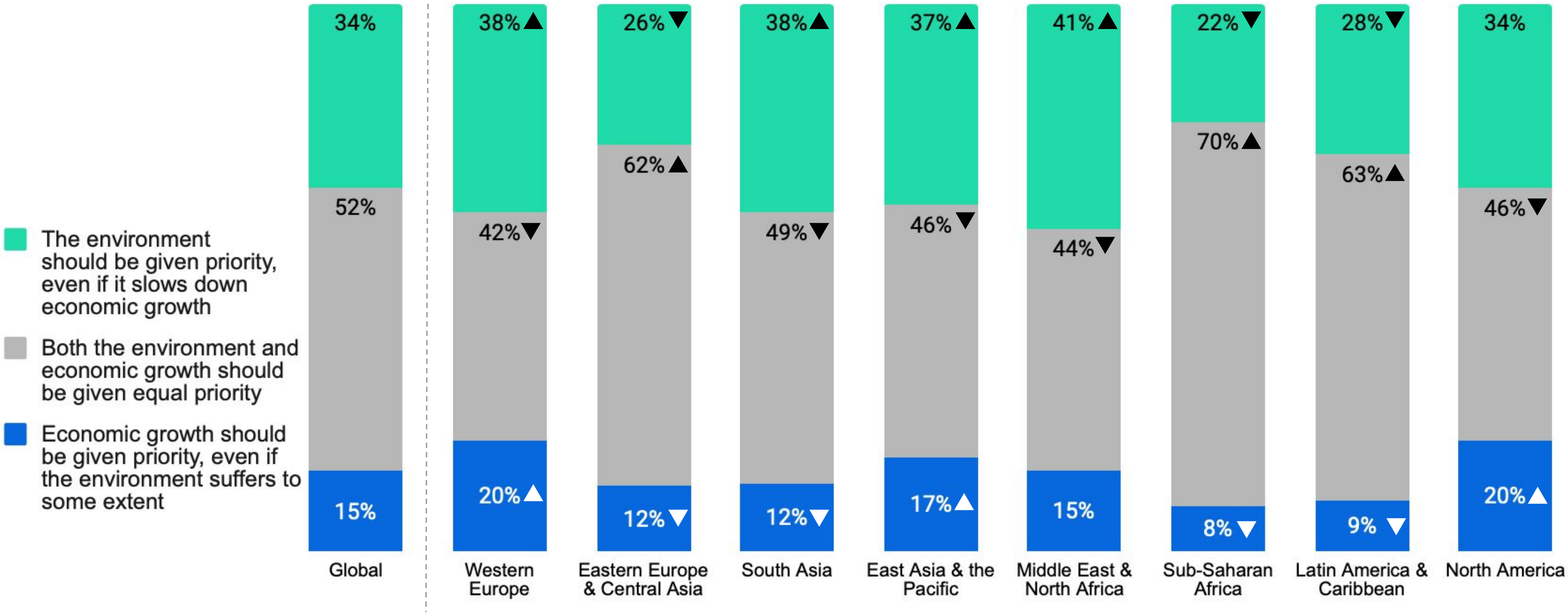
% indicating that their government is doing too little to protect the environment



Statistically significant differences vs. 2020 at 95% CI indicated by ▲▼ symbols

Climate vs. Economy Prioritization

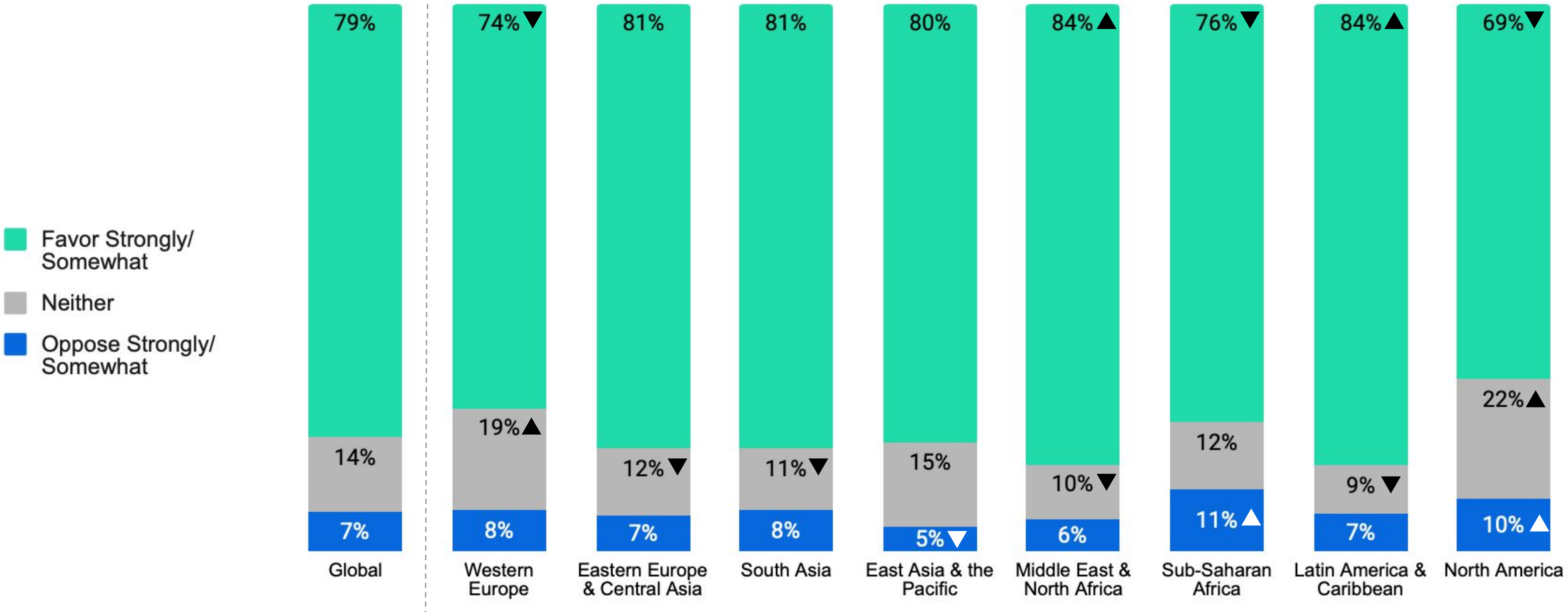
Western European, East Asian, South Asian and North American respondents are significantly more likely to prioritize economic growth over the environment. Respondents in Eastern European & Central Asia, Sub-Saharan Africa and Latin America take a less polarizing stance with a majority of them believing that both entities should be given equal priority for growth.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Tax on Business Pollution

North American and Sub-Saharan African respondents are significantly more likely to oppose policies that put extra taxes on businesses that pollute. Conversely, respondents in the Middle East, Latin America and South Asia demonstrate the highest level of favor for these policies.



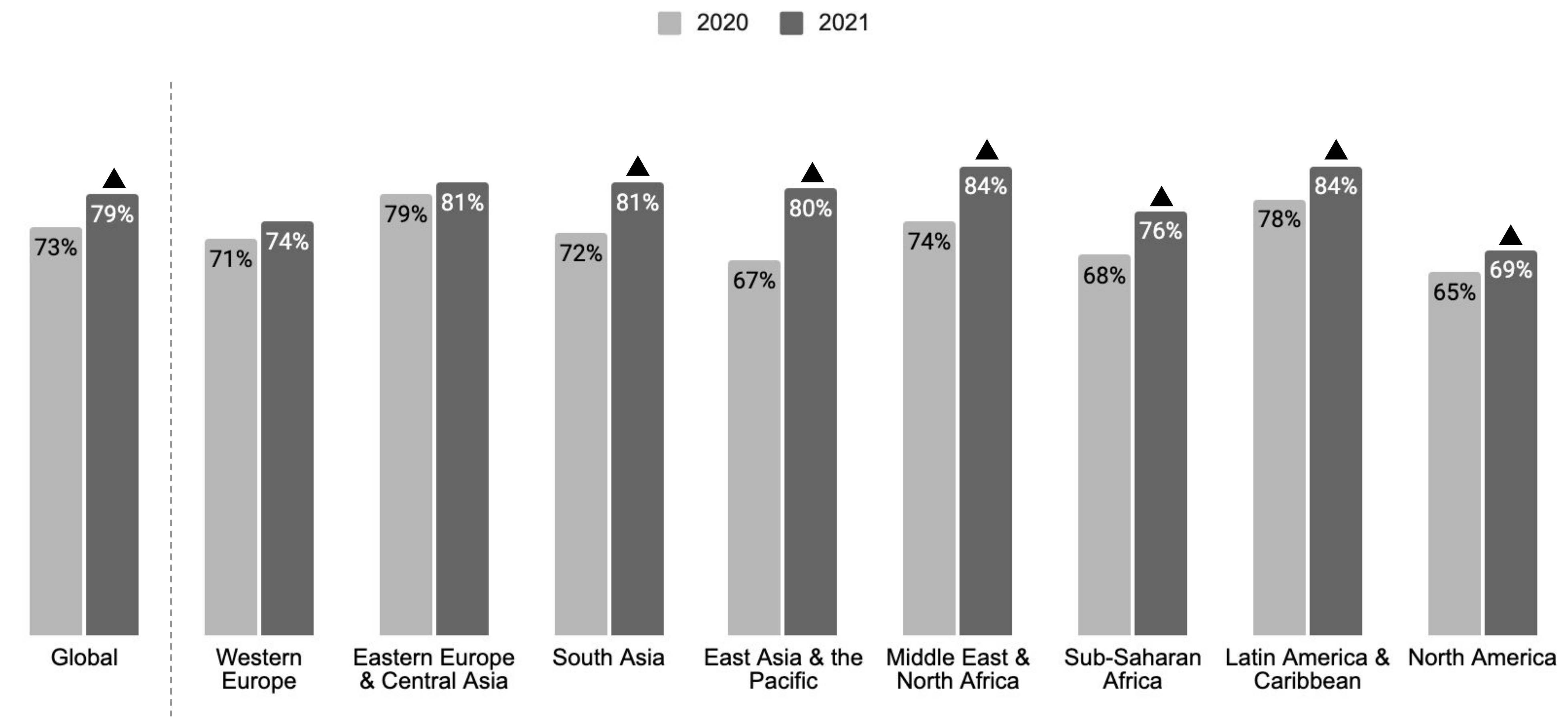
Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Tax on Business Pollution

qualtrics XM + SAP

Globally, consumers are significantly more in favor of taxing businesses that pollute; East Asia, MENA, South Asia, and Sub-Saharan Africa contribute most positively to this sentiment. Most other markets demonstrate directional increases.

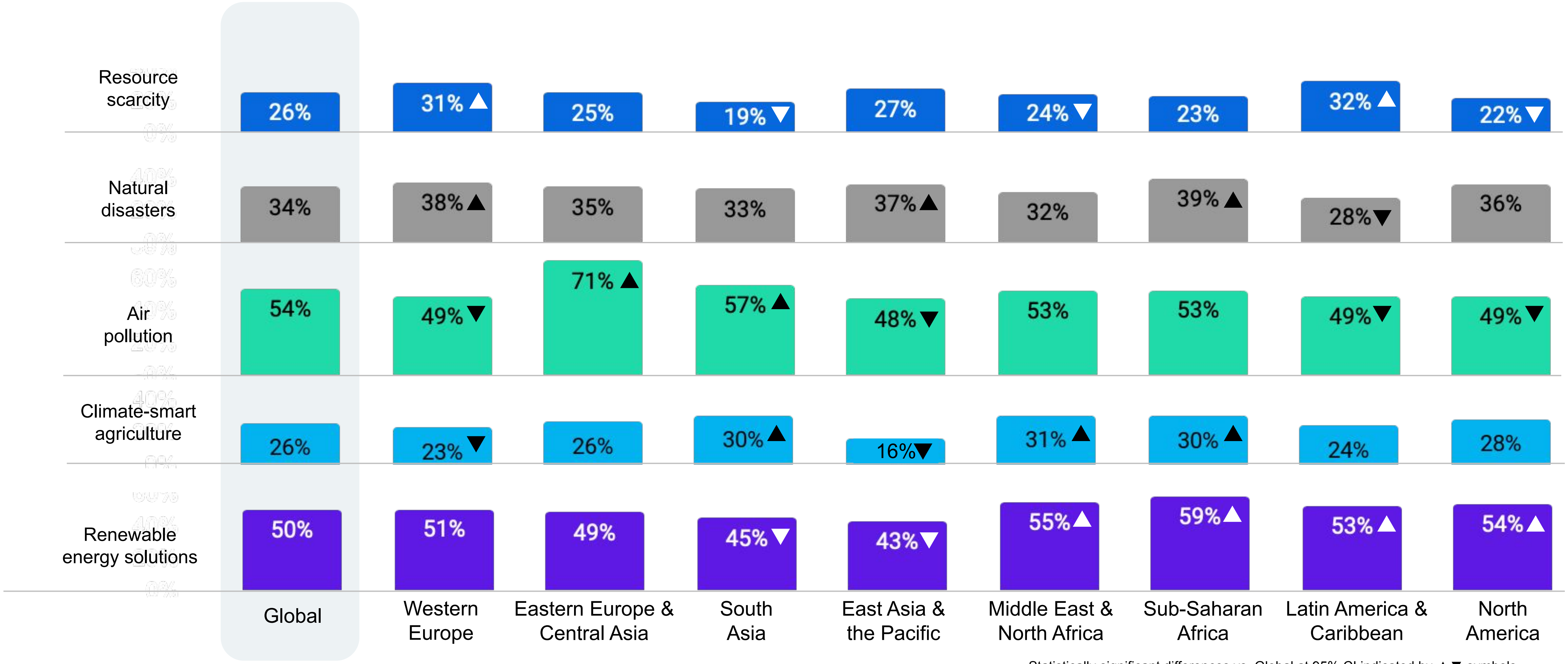
% indicating they strongly/ somewhat favor extra taxes on businesses that pollute



Statistically significant differences vs. 2020 at 95% CI indicated by ▲▼ symbols

Most Important Issues

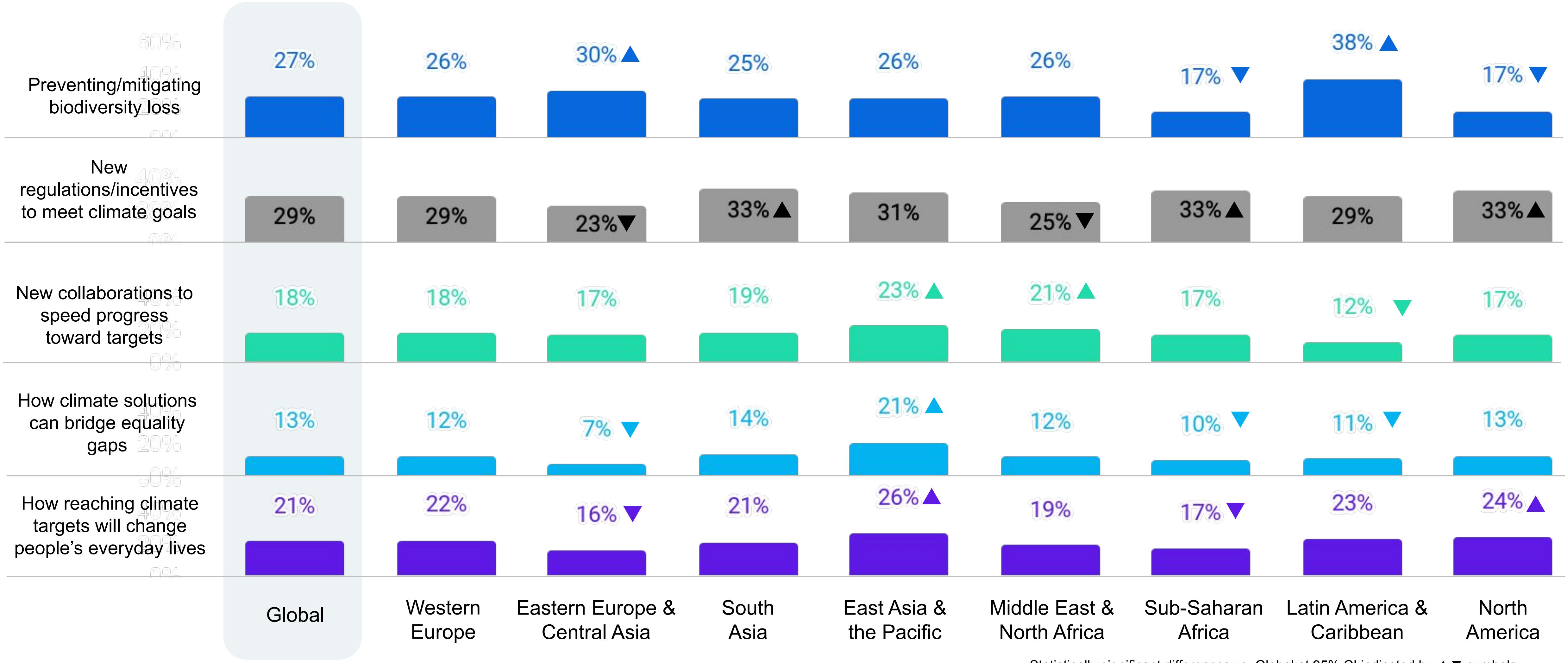
Across regions, air pollution and renewable energy solutions are the most pressing when it comes to the top climate-related issues world leaders should address.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Most Important Issues, ctd.

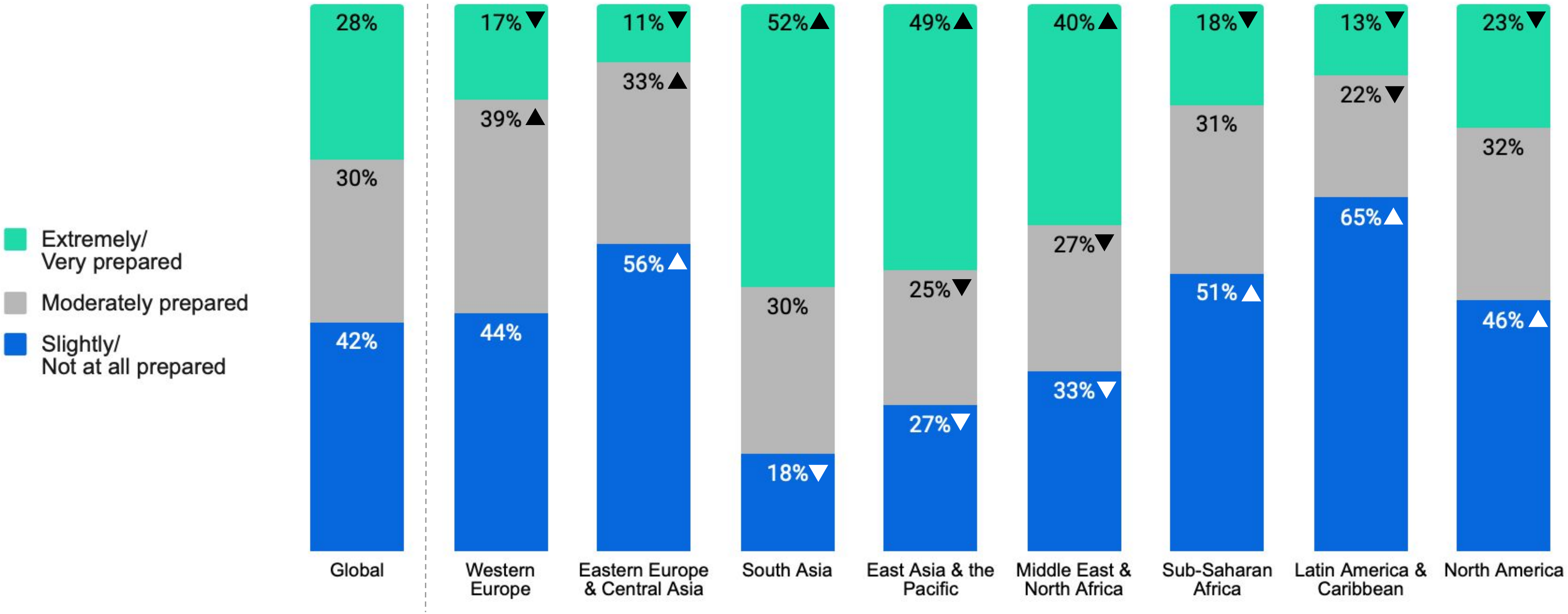
Around a third of respondents across regions also believe world leaders should focus on establishing new regulations and incentives to help meet climate goals.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Preparedness Based on COVID

South Asian respondents feel that their country is most prepared for addressing issues like climate change in light of their COVID response. On the other hand, respondents in Latin America, Eastern Europe & Central Asia and Sub-Saharan Africa are less optimistic about their countries' preparedness.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

5

Miscellaneous Climate Topics

Misc. Climate KPI Summary

Generally, global communities are concerned about wildlife decline due to climate change. Concern regarding the effect of plastics on communities is also top of mind across regions with many citing a foremost concern for its effects on the ocean and marine life. High importance of recycling is most evident in Latin America, but all regions agree that their top barrier to recycling more is a lack of programs and services that enable them to do so.

	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Extremely/Very **Concerned** about **Wildlife Decline**	72%	72%	66%	85%	60%	72%	76%	85%	65%
Extremely/Very **Concerned** about **Plastic Products** in Community	67%	66%	57%	84%	56%	71%	73%	81%	56%
Top **Concern** about **Plastics**	Effects on the ocean and marine life	Effects on the ocean and marine life	Effects on the ocean and marine life	Effects on the ocean and marine life	**Litter and trash from plastics**	**Effects on human health**	Effects on the ocean and marine life	Effects on the ocean and marine life	Effects on the ocean and marine life
Extremely/Very **Important** to **Recycle** when Possible	84%	85%	79%	91%	74%	85%	91%	93%	80%
Top **Barrier** to **Recycle**	Lack of recycling programs/ services	Lack of recycling programs/ services	Lack of recycling programs/ services	Lack of recycling programs/ services	Lack of recycling programs/ services	Lack of recycling programs/ services	Lack of recycling programs/ services	Lack of recycling programs/ services	Lack of recycling programs/ services

/ indicates highest/lowest KPI score across regions

Green/Red text indicates statistical significance compared to Global results at 95% confidence level

qualtrics XM + SAP

Misc. Climate KPI Summary, ctd.

Global communities unanimously agree that if using reusable packaging would guarantee the reduction of harmful effects on the environment, they would be inclined to use them more. Choosing products with reusable packaging is identified as the zero-waste lifestyle practice that respondents would be most willing to adopt across regions. Most agree that climate change could cause more global pandemics in the future while sentiment towards technology's role on the environment fluctuates regionally.

	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Top Factor that would lead to More Use of **Reusable Packages** and Containers	Less harmful effects on environment	Less harmful effects on environment	Less harmful effects on environment	Less harmful effects on environment	Less harmful effects on environment	Less harmful effects on environment	Less harmful effects on environment	Less harmful effects on environment	Less harmful effects on environment
Most **Adoptable Zero-Waste** Lifestyle Practice	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging	Choosing products w/ reusable packaging
Extremely/Somewhat **Positive** Impact of **Technology** on the Environment*	51%	37%	30%	64%	64%	54%	61%	59%	50%
Extremely/Somewhat **Positive** Impact of **COVID-19** on the Environment	47%	45%	33%	65%	45%	53%	41%	55%	39%
Climate Change Could Cause More Global **Pandemics**	68%	63%	60%	83%	78%	72%	67%	62%	57%

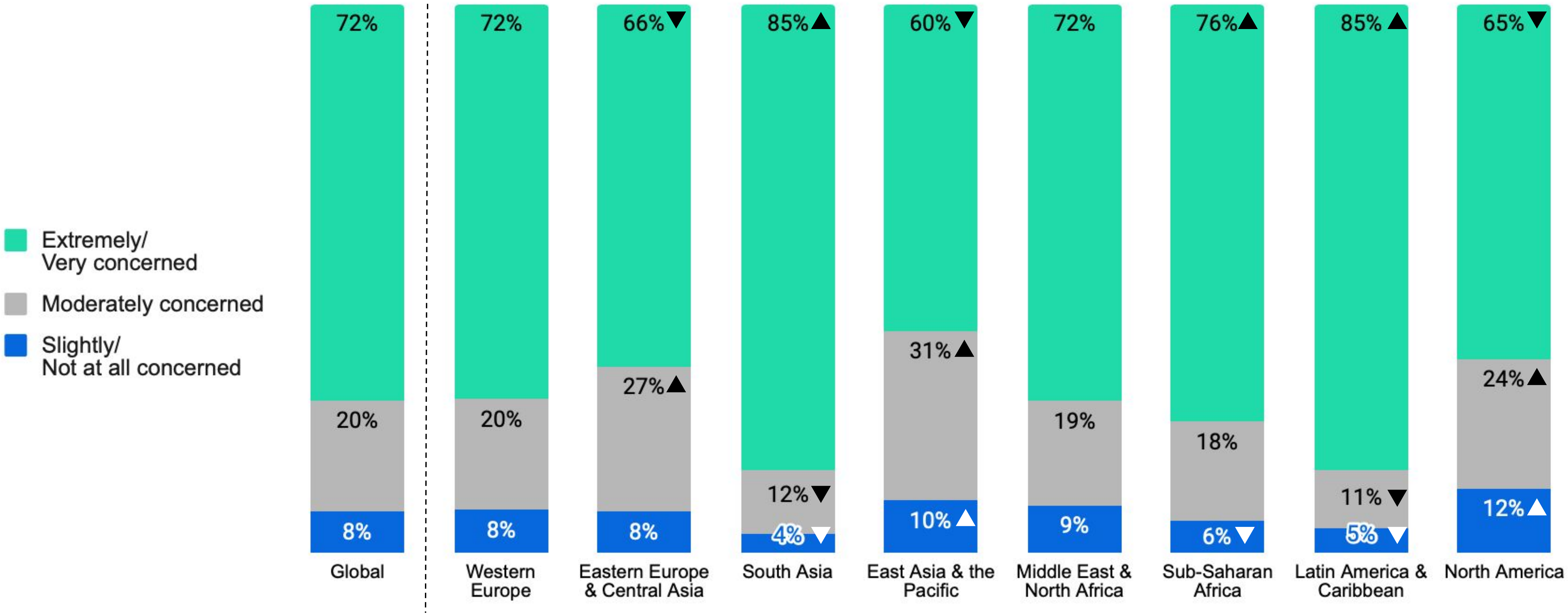
*only asked among corporate respondents

/ indicates highest/lowest KPI score across regions

Green/Red text indicates statistical significance compared to Global results at 95% confidence level

Level of Concern about Wildlife

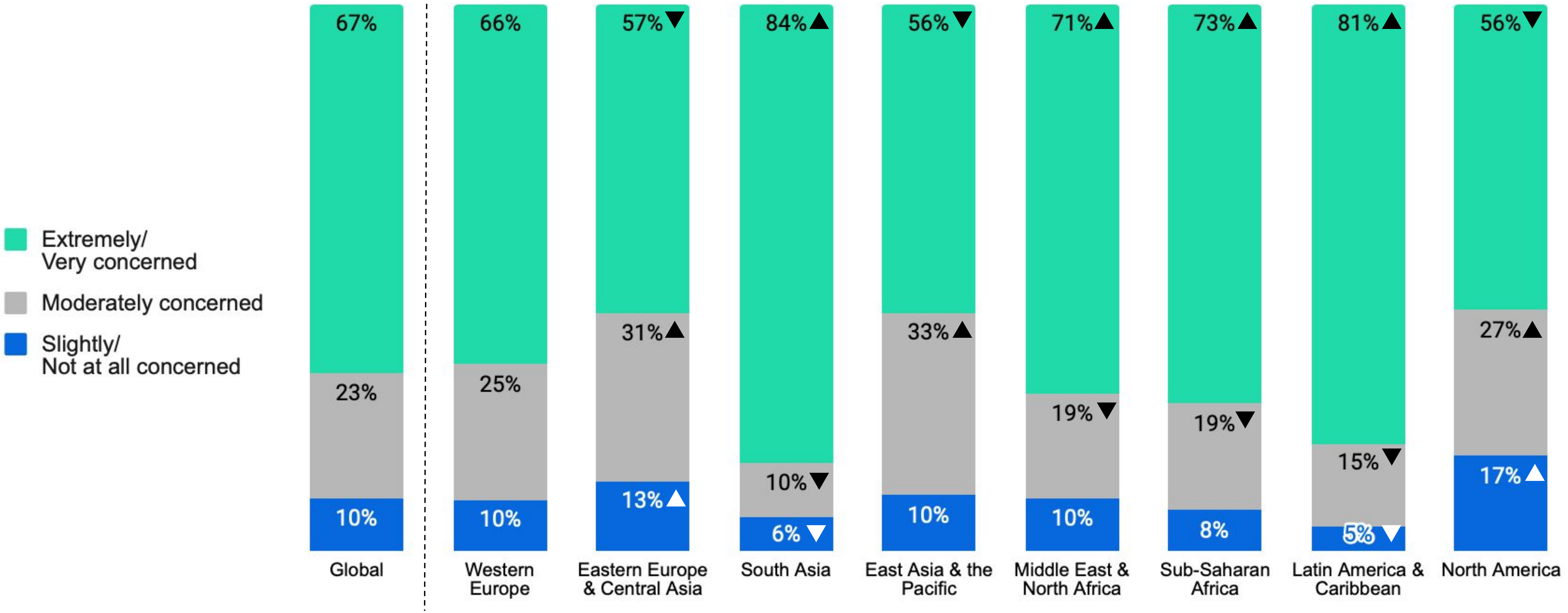
South Asian and Latin American respondents share similar levels of concern in regards to the decline of wildlife due to climate change. Although still a small proportion with only 1-in-10 reporting, respondents in North America and East Asia & the Pacific are the only ones to be significantly more likely to say they are slightly or not at all concerned.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Level of Concern about Plastics

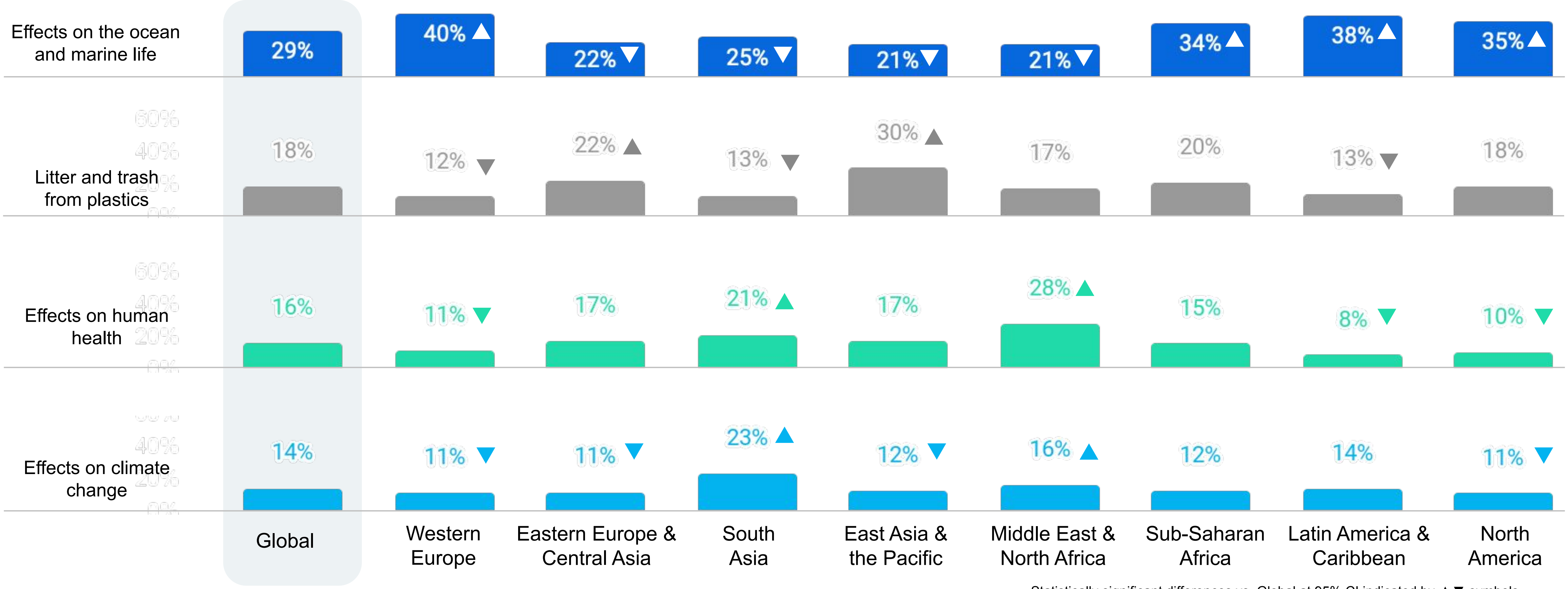
While two-thirds of global respondents express concern over the use of plastic products, Eastern Europe & Central Asia, East Asia & the Pacific and North America are less likely to be worried about the effects of plastics with only around half expressing their personal concern.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Top Concern about Plastics

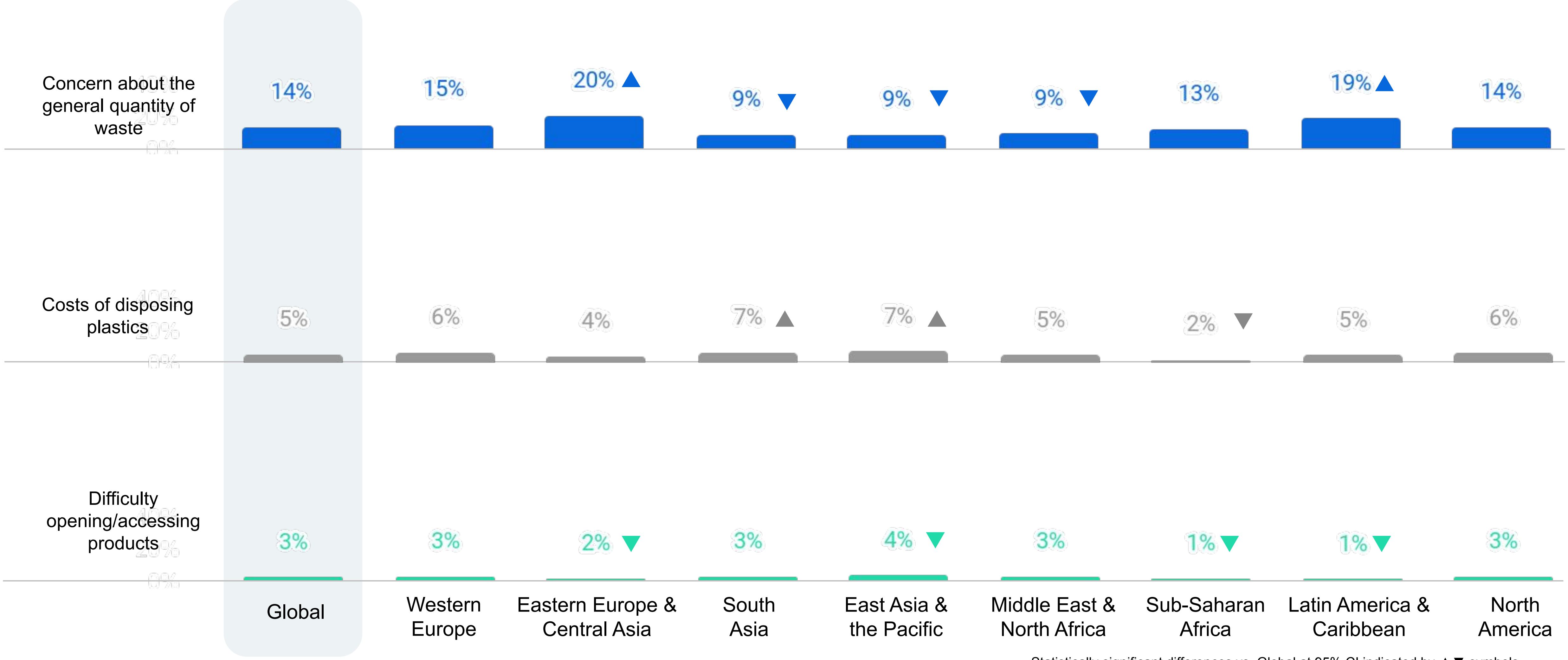
When prompted to select their biggest concern about plastics, effects on the ocean and marine life is the overwhelming concern first and foremost in respondents' minds across the majority of regions. The exception exists in East Asia & the Pacific and the Middle East & North Africa where respondents are most concerned with the effects plastics will have on litter and trash in their community and on human health, respectively.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Top Concern about Plastics, ctd.

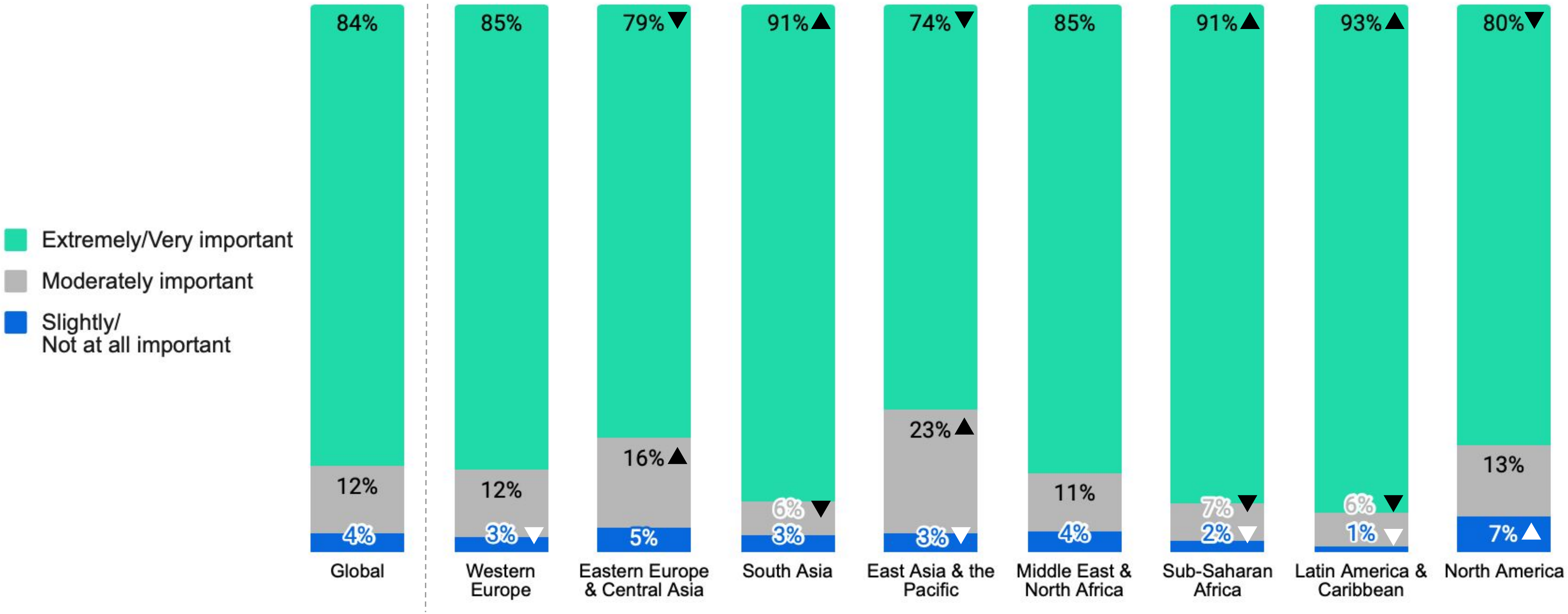
The difficulty in opening or accessing products due to plastic packaging is the least concerning outcome for respondents. Around a fifth of respondents in Eastern Europe & Central Asia and Latin America & the Caribbean are concerned about the general quantity of waste that plastic use produces.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Importance of Recycling

More than 3-in-4 Eastern Europe & Central Asia respondents are likely to say that it is extremely or very important for them to personally recycle when they can. Respondents in East Asia & the Pacific and the Middle East & North Africa experience a closer tripartite split in sentiment.

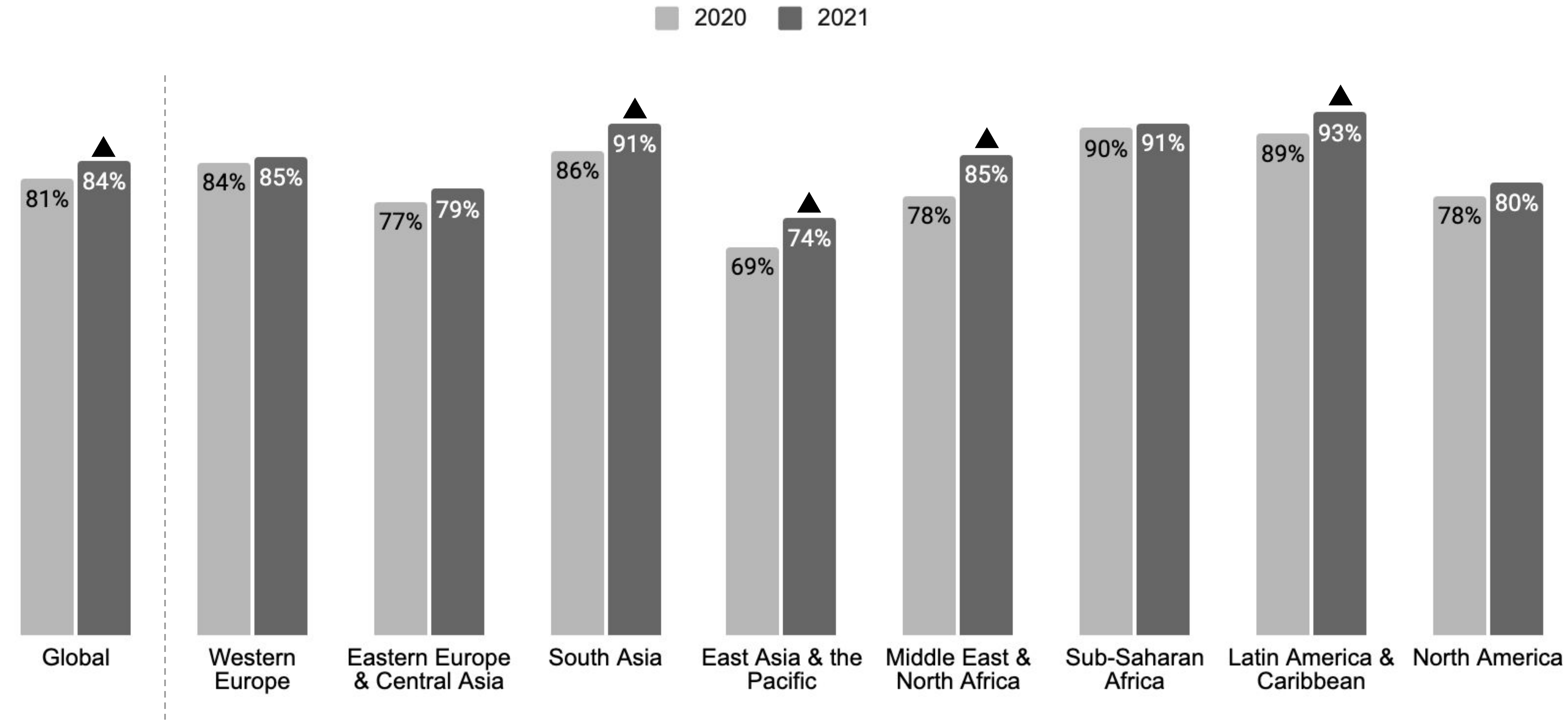


Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Importance of Recycling

Although significant, global importance of recycling has only increased 3% points. MENA, East Asia, South Asia and to some extent, LAC indicate significantly more importance to recycle, while most other markets held flat or directionally increased in importance.

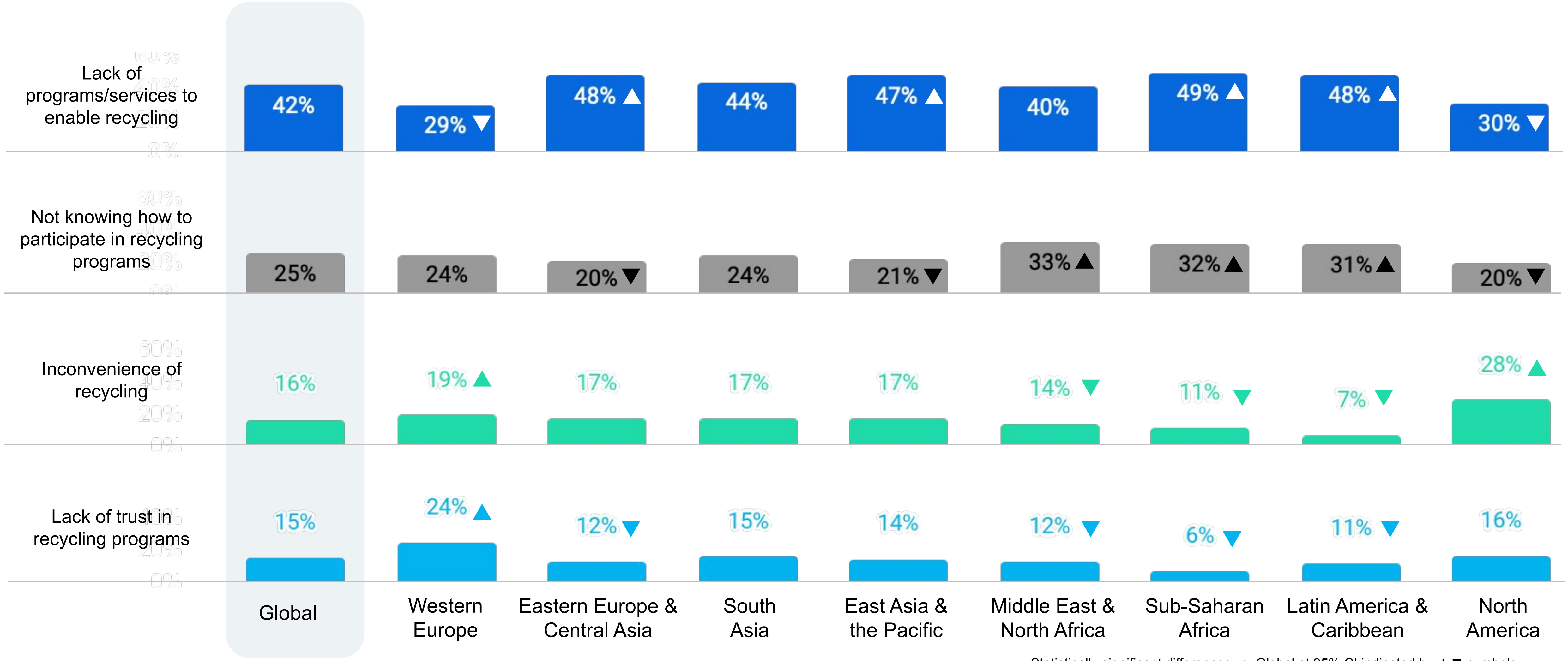
% indicating that it is extremely/ very important for consumers to recycle what they can



Statistically significant differences vs. 2020 at 95% CI indicated by ▲▼ symbols

Top Barrier to Recycling

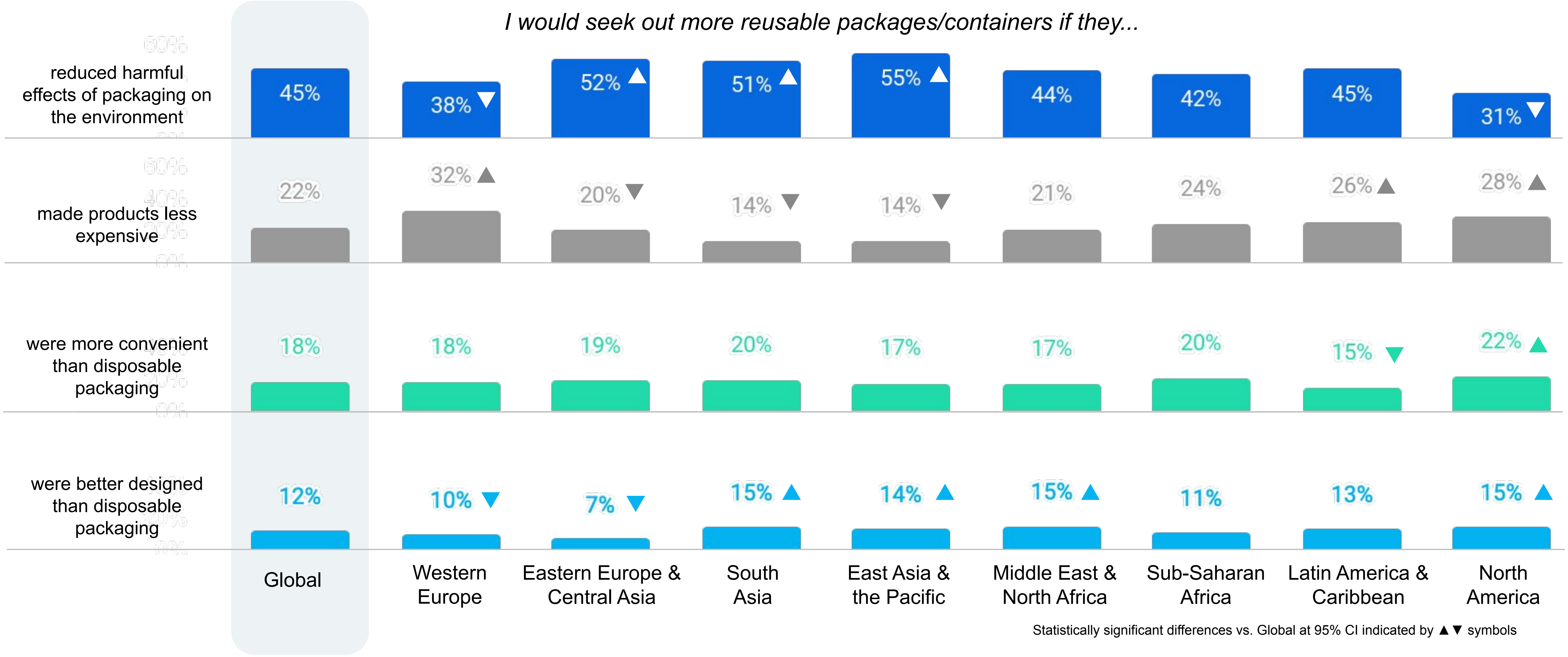
Regionally, a lack of recycling programs and services is the driving force behind what keeps people from recycling more, and this barrier has increased since 2020 (+5% points, driven mostly by East Asia +18%pts, South Asia +10%pts and MENA +6%pts).



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Changes to Environmentally Friendly Behaviors

Reducing the harmful effects of packaging on the environment is the top driver in encouraging respondents to seek out more reusable packages and containers in the future (a sentiment that increased 3% points vs. 2020, driven by East Asia +21%pts and South Asia +10%pts).



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

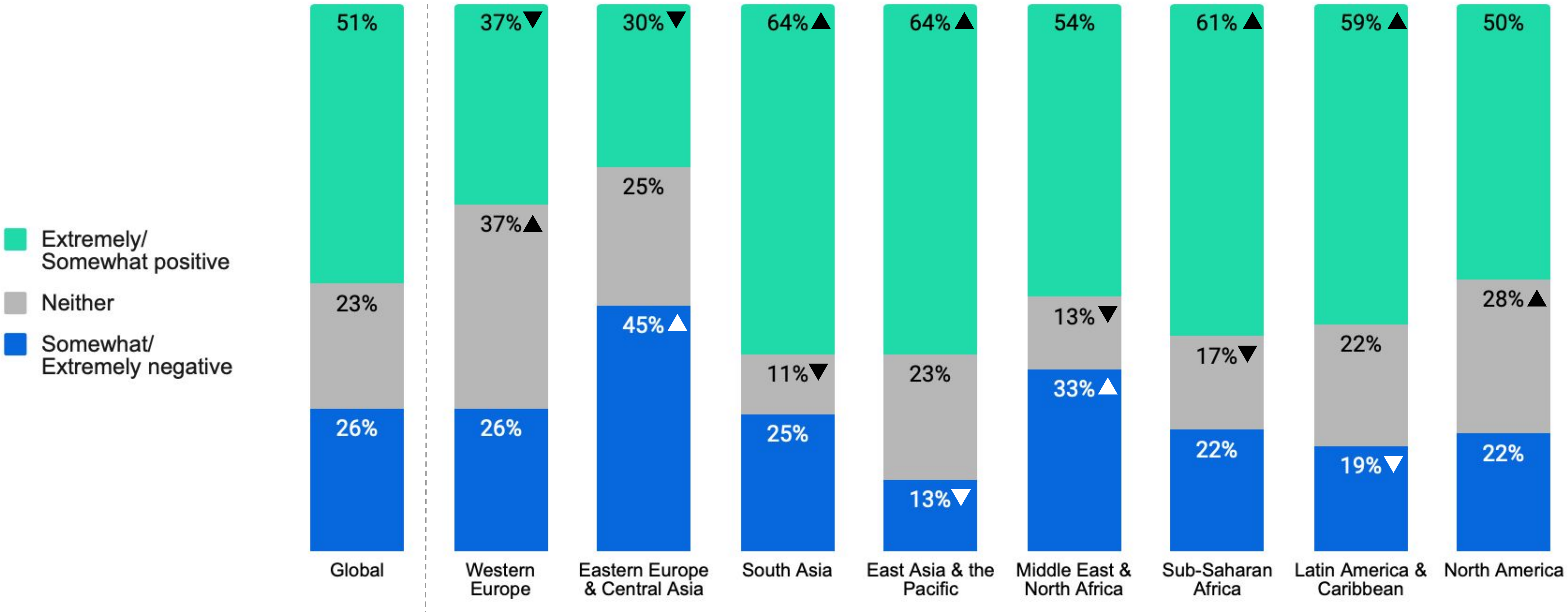
Most Adoptable Zero-Waste Practices

The majority of respondents across regions are most willing to choose new products with reusable packaging and avoid products that are hard to recycle in their efforts to pursue a more zero-waste lifestyle.

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Technology’s Effect on Environment

Respondents in the Middle East & Africa and North America are most closely in line with global sentiment with half believing technology will have a positive impact on the environment. European respondents are significantly less likely to feel positively.

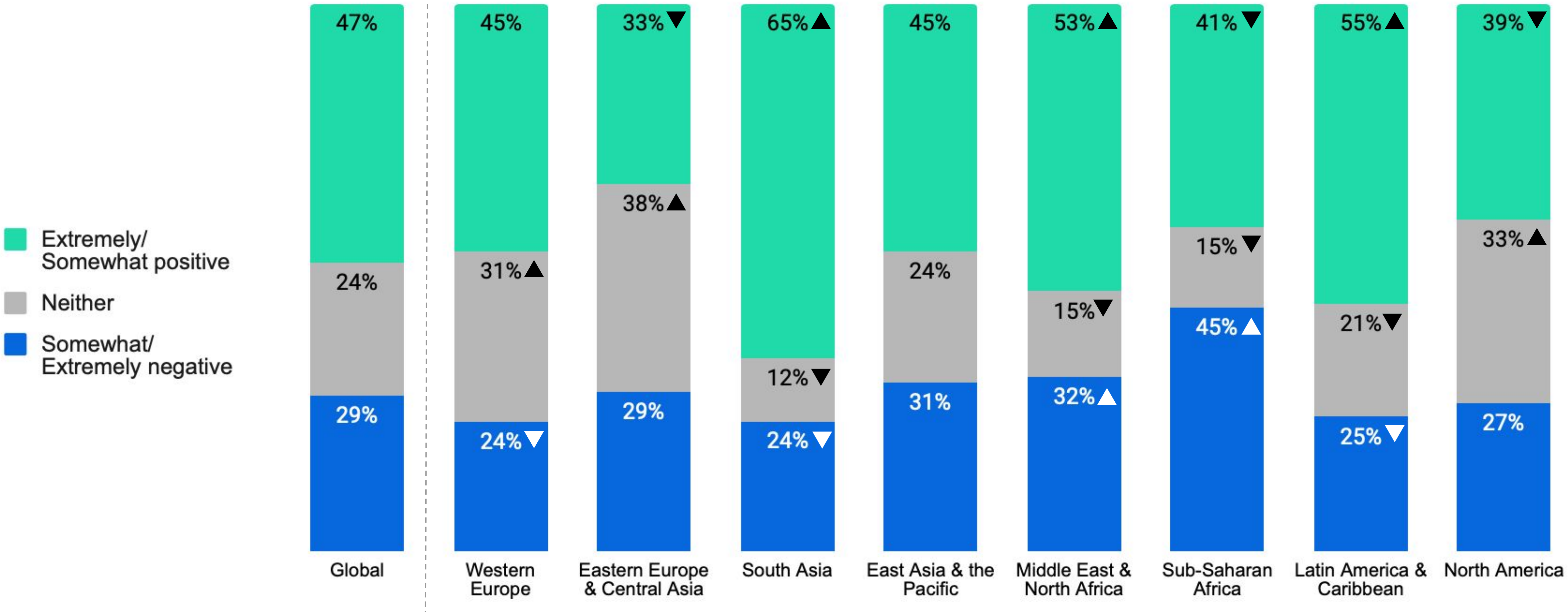


Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Impact of COVID on Environment

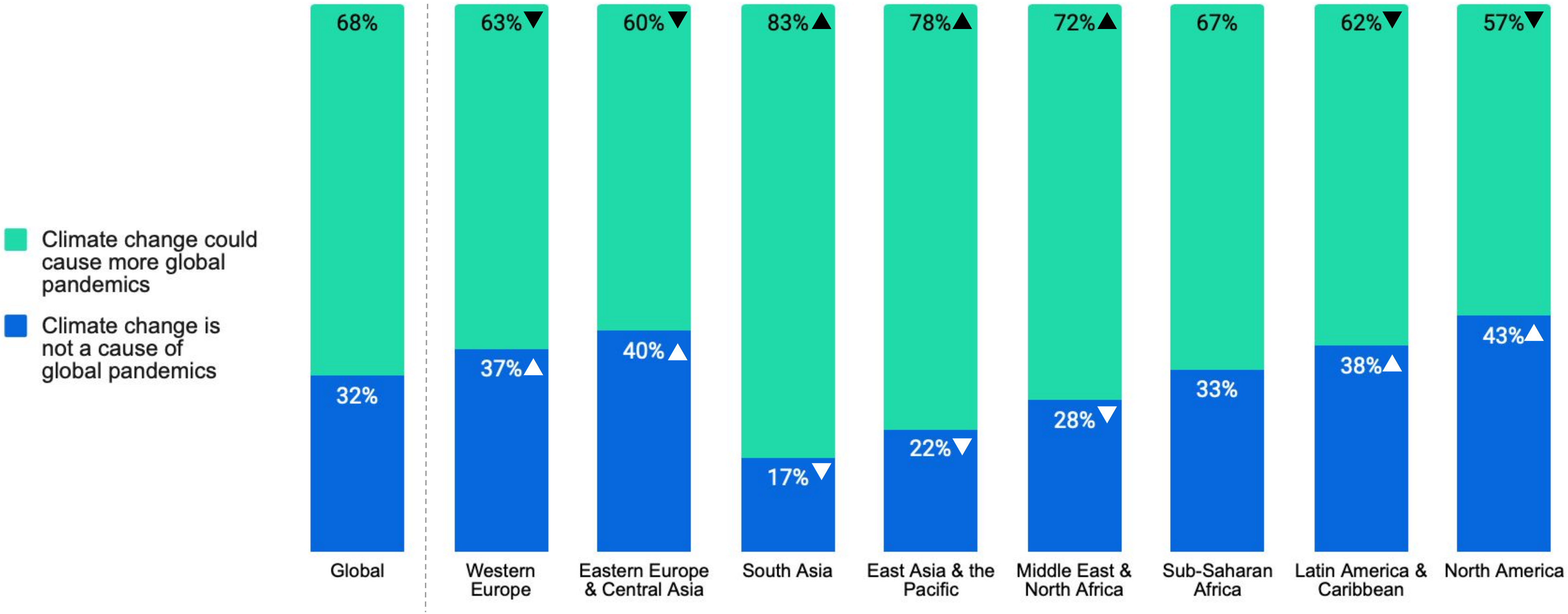
South Asian, Middle Eastern & North African and Latin American & Caribbean respondents are significantly more likely to believe that COVID-19 has had a positive impact on the environment compared to global results.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Pandemics Caused by Climate Change

The majority of respondents, regardless of region, believes that climate change could cause more global pandemics in the future. South Asian respondents believe this most strongly, while North America sees the highest proportion of those who do not view climate change as a potential cause.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

6 Business and Climate Change

Business KPI Summary

New waste-free processes and sustainable materials/renewable energy are consistently viewed as the top ways corporate leaders can make an impact, but sentiment around business progress, climate risk and business responsibility varies more by region. South Asia has the highest proportion of respondents who claim climate change poses a risk to their organization, but the fewest who find change happening too slowly.

	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Climate Change Poses Top or Major **Risk***	49%	45%	39%	66%	49%	53%	39%	62%	34%
Businesses Extremely/Very **Responsible** in Taking **Action** to Address Climate Change	81%	85%	80%	85%	57%	85%	91%	87%	75%
Change Happening **Too Slowly**	51%	59%	63%	37%	35%	45%	56%	59%	52%
Most Agreed Upon **Perception**	Critical role of business in negotiating climate targets	**Resource consumption rate cannot last**	Critical role of business in negotiating climate targets	Critical role of business in negotiating climate targets	Critical role of business in negotiating climate targets	**Resource consumption rate cannot last**	Critical role of business in negotiating climate targets	Critical role of business in negotiating climate targets	Critical role of business in negotiating climate targets
Top **Area** of Business **Impact**	New Waste-free Processes	New Waste-free Processes	New Waste-free Processes	New Waste-free Processes	**Sustainable Materials & Renewable Energy**	**Sustainable Materials & Renewable Energy**	New Waste-free Processes	**Sustainable Materials & Renewable Energy**	New Waste-free Processes

*only asked among corporate respondents

/ indicates highest/lowest KPI score across regions

Green/Red text indicates statistical significance compared to Global results at 95% confidence level

Business KPI Summary, ctd.

Sustainability claims and ESG metrics can be more polarizing; South Asian respondents tend to be the most trusting and positive, while European respondents trend in the opposite direction. Sustainable materials and processes along with staff education are top priorities for corporate respondents. However, COVID-19 complications, lack of education and deprioritization can hinder progress toward sustainability goals.

	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Trust **Claims** about **Sustainable** Business **Practices** a Great Deal or a Lot	28%	20%	17%	50%	40%	32%	26%	19%	20%
Has a More **Positive** Opinion of Companies with **ESG** Programs*	69%	54%	66%	86%	73%	76%	75%	73%	56%
ESG **Metrics** are Extremely or Very **Useful***	51%	33%	39%	71%	44%	59%	61%	55%	43%
Top **Business Priority** to Address Climate Change*	Sustainable materials/ renewable energy	**Educate staff**	**Educate staff**	**New waste-free processes**	Sustainable materials/ renewable energy	**Educate staff**	**Educate staff**	**Educate staff**	**New waste-free processes**
Top **Challenge** in Meeting Business **Sustainability** Goals*	Complications related to COVID-19	**Sustainability must be prioritized**	Complications related to COVID-19	Complications related to COVID-19	Complications related to COVID-19	**Awareness and education of staff**	**Awareness and education of staff**	Complications related to COVID-19	**Sustainability must be prioritized**

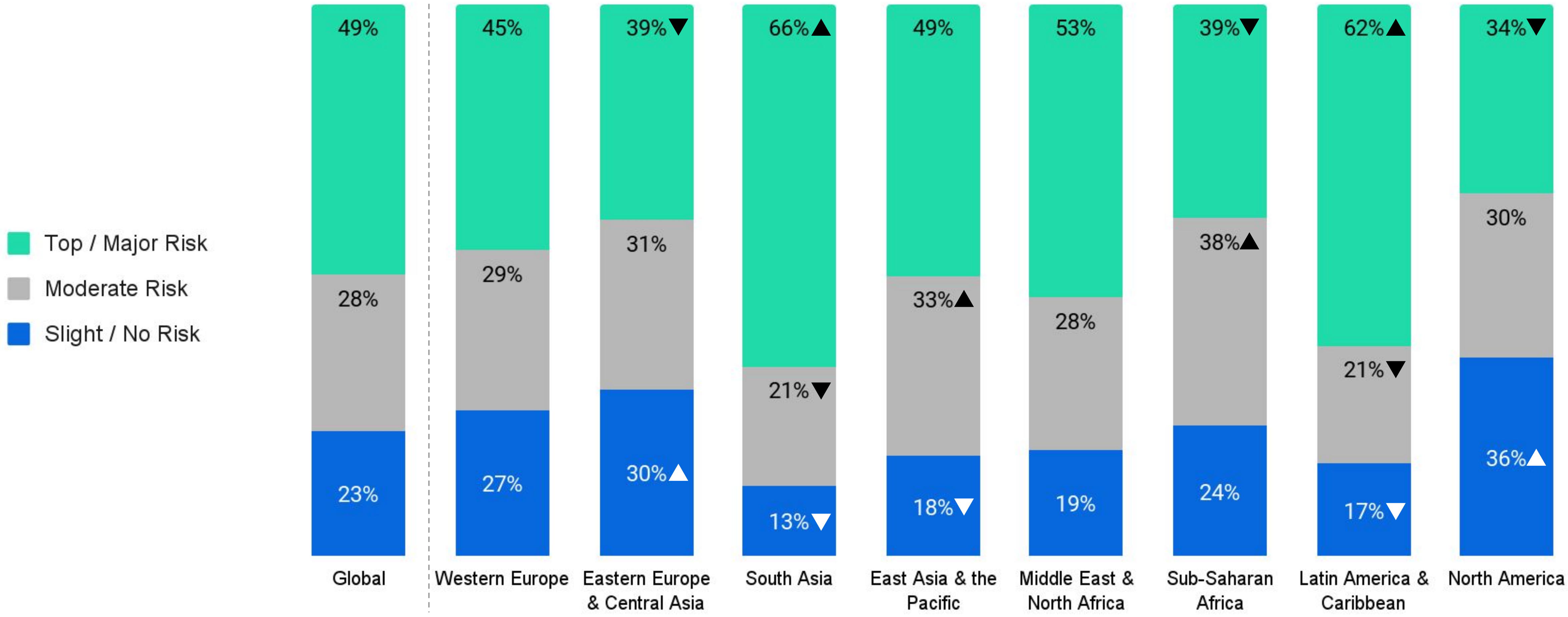
*only asked among corporate respondents

/ indicates highest/lowest KPI score across regions

Green/Red text indicates statistical significance compared to Global results at 95% confidence level

Business Risk

Climate change poses the biggest risk to organizations in South Asia, with over two-thirds of corporate respondents calling it a top or major risk. Just over one-third of North American organizations feel the same, while around 1-in-5 state that climate change poses a slight or no risk.

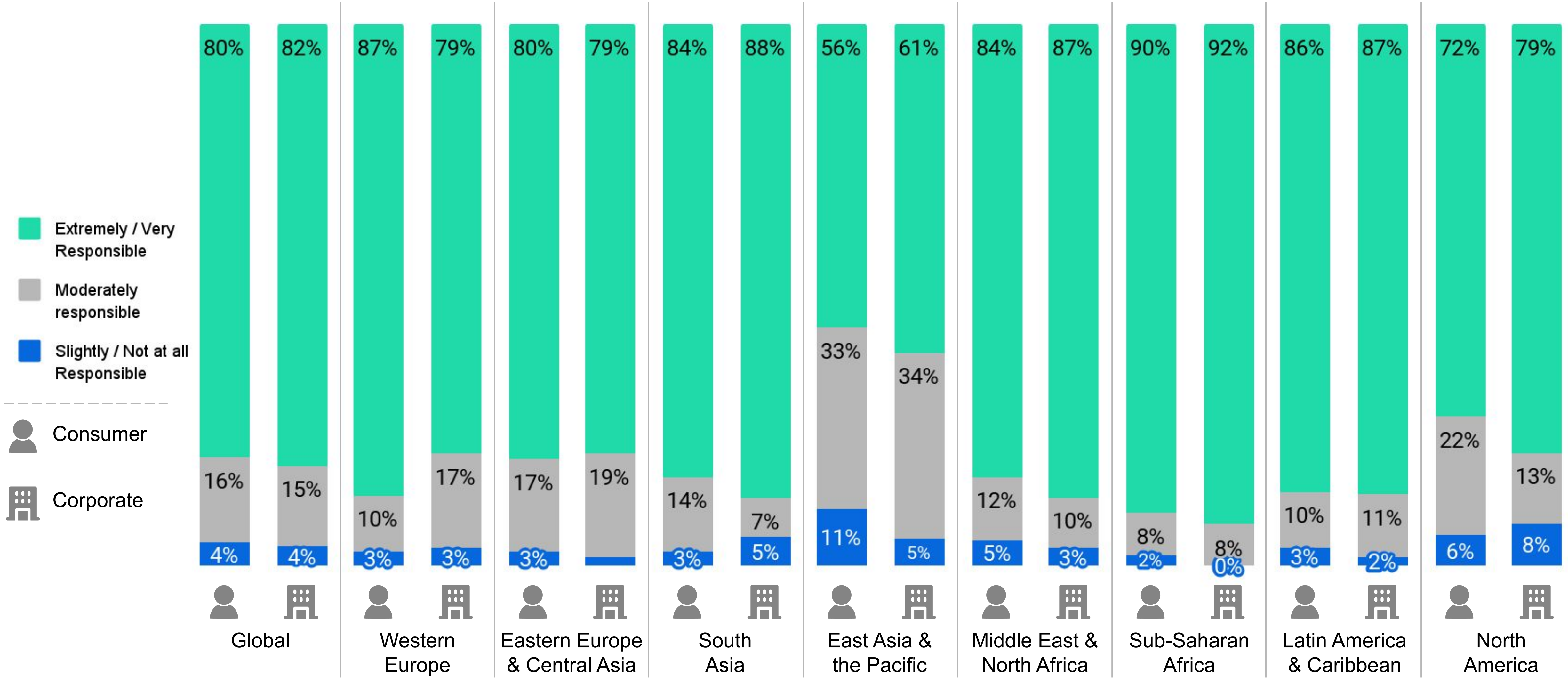


Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Business Responsibility

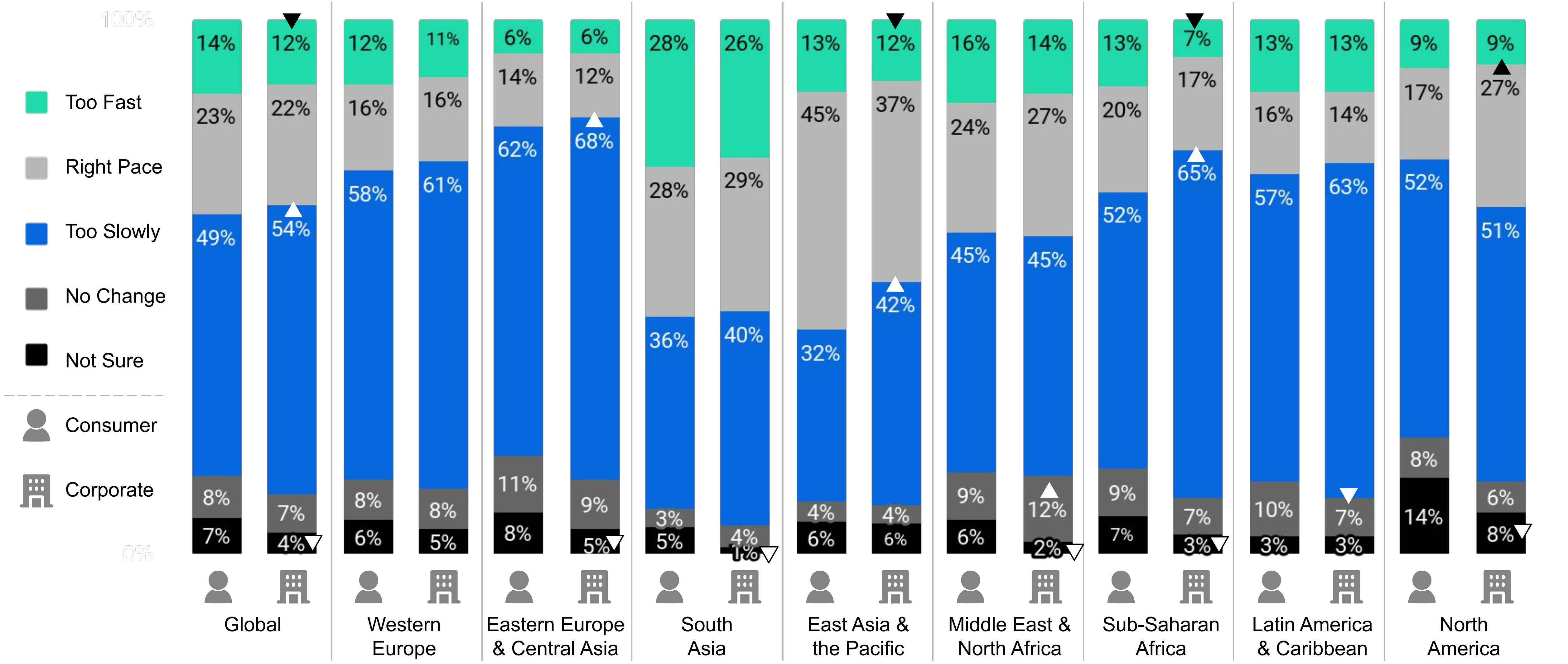
Almost all consumer and corporate respondents agree that businesses are responsible for taking action to address climate change.



Statistically significant differences vs. Consumers at 95% CI indicated by ▲▼ symbols

General Business Progress

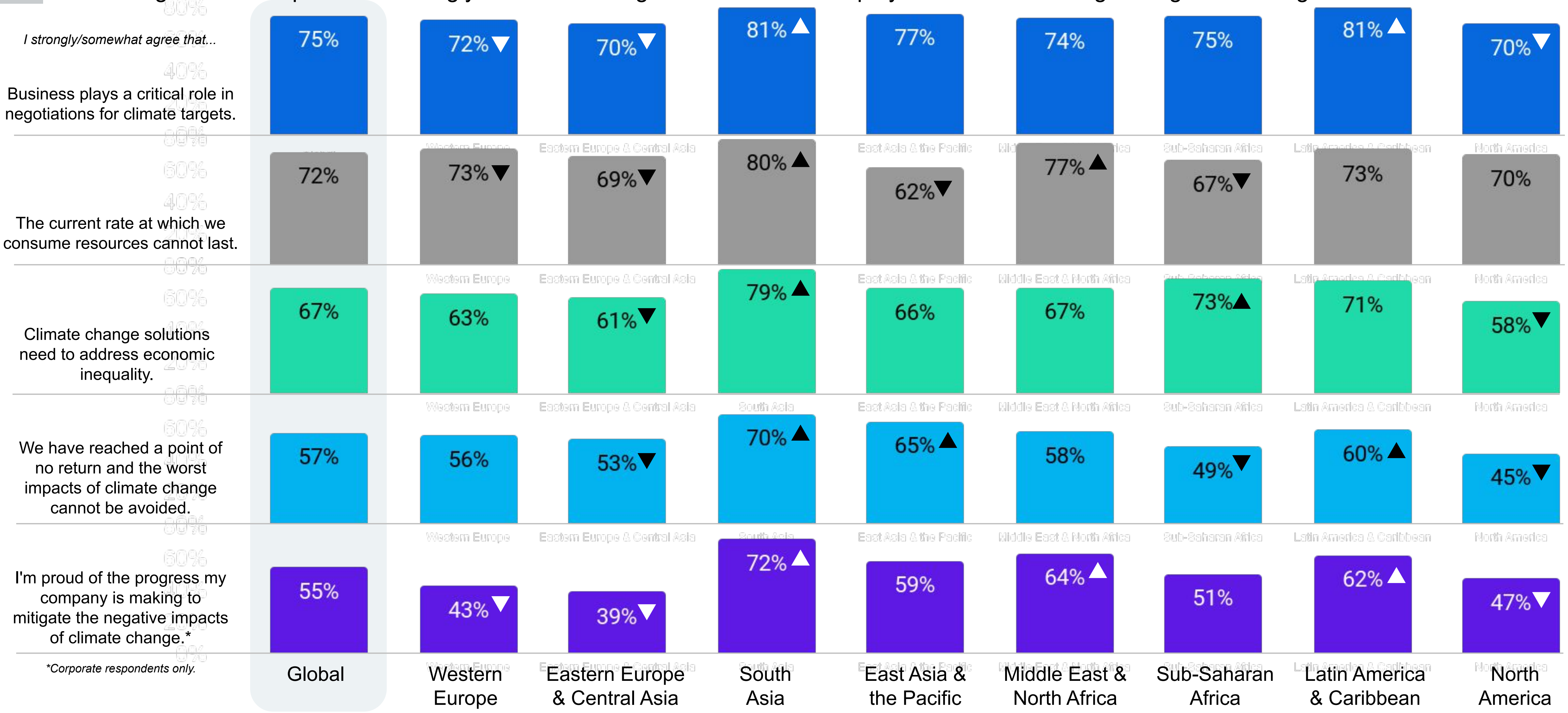
In comparison to general consumers, corporate respondents in Eastern Europe & Central Asia, East Asia & the Pacific, and Sub-Saharan Africa tend to find that businesses are making changes too slowly. Consumers in North America are less aware of changes being made.



Statistically significant differences vs. Consumers at 95% CI indicated by ▲▼ symbols

Climate Change Perceptions

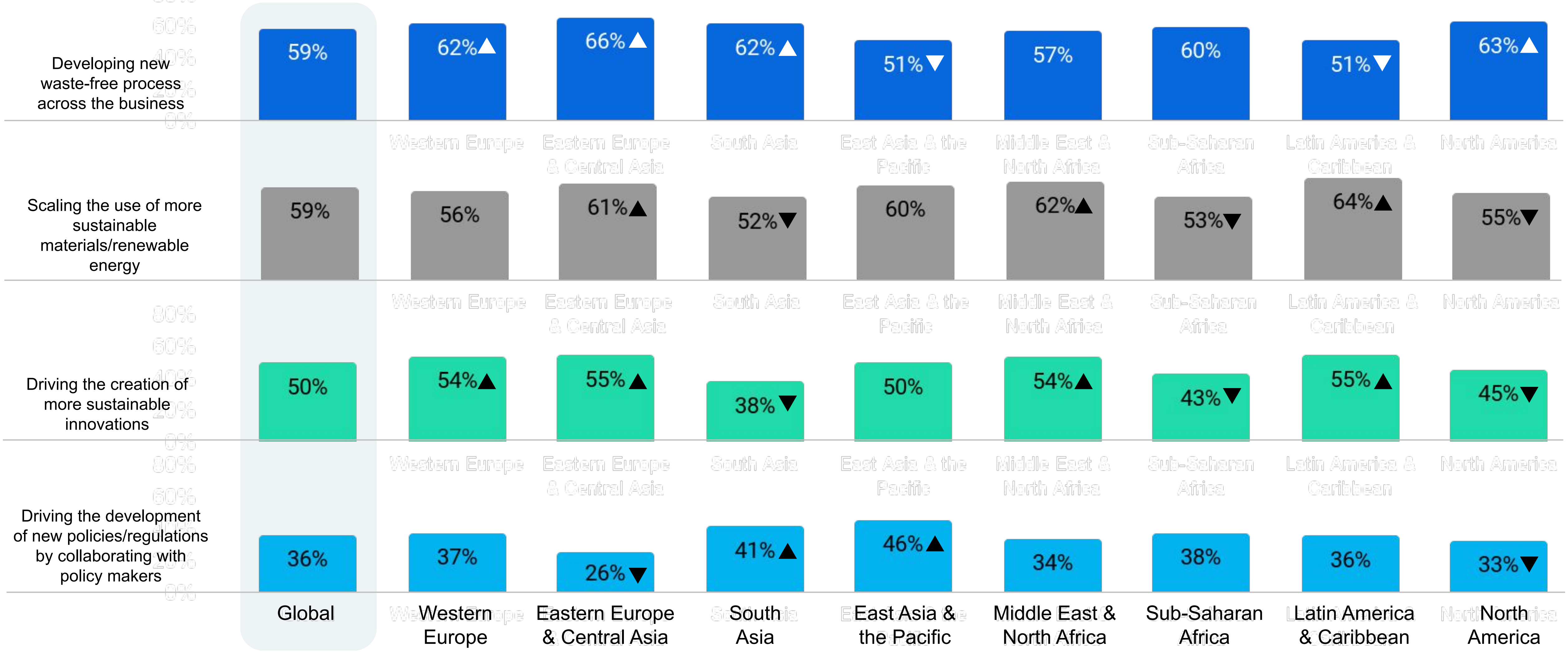
On average, 3-in-4 respondents strongly or somewhat agree that businesses play a critical role in negotiating climate targets.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Business Impact

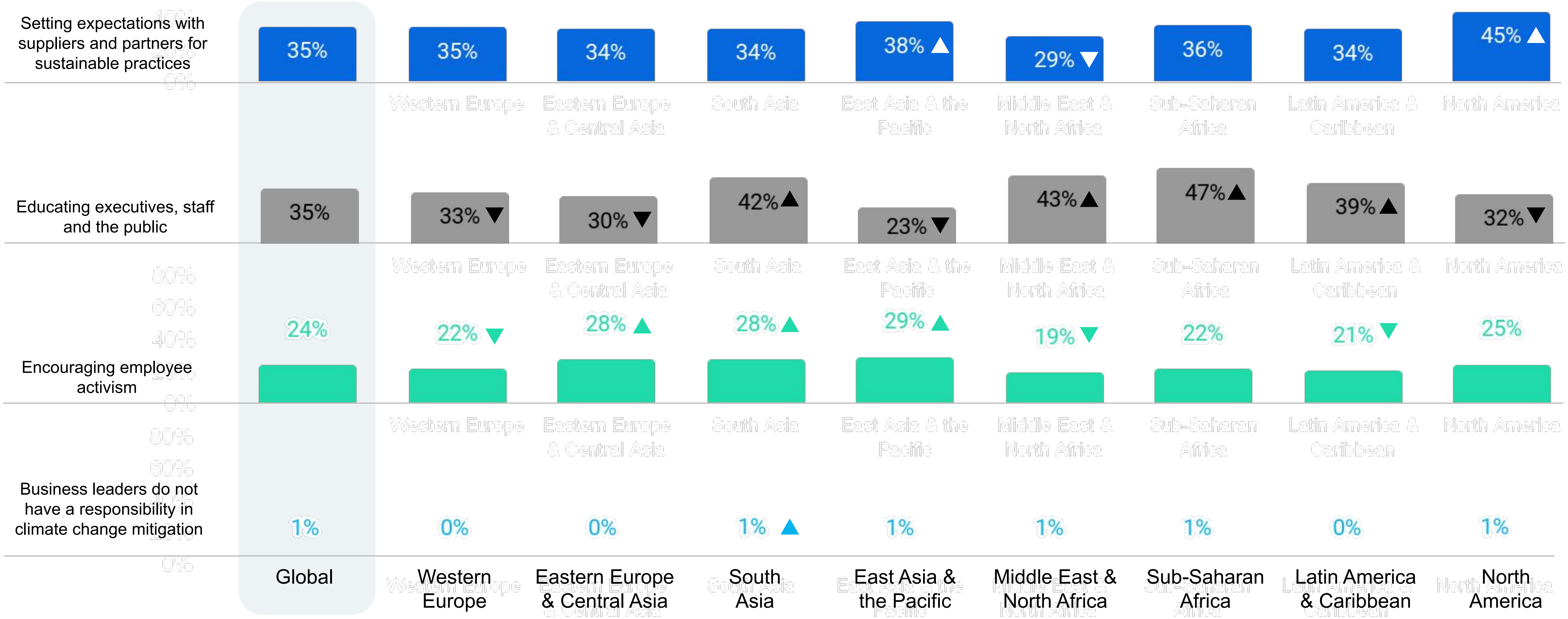
Developing new waste-free processes across businesses is among the most impactful ways business leaders could take action for climate change. Scaling the use of more sustainable materials/renewable energy is also a top priority for respondents, particularly in petroleum-centric regions like Latin America and the Middle East.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Business Impact, cont'd...

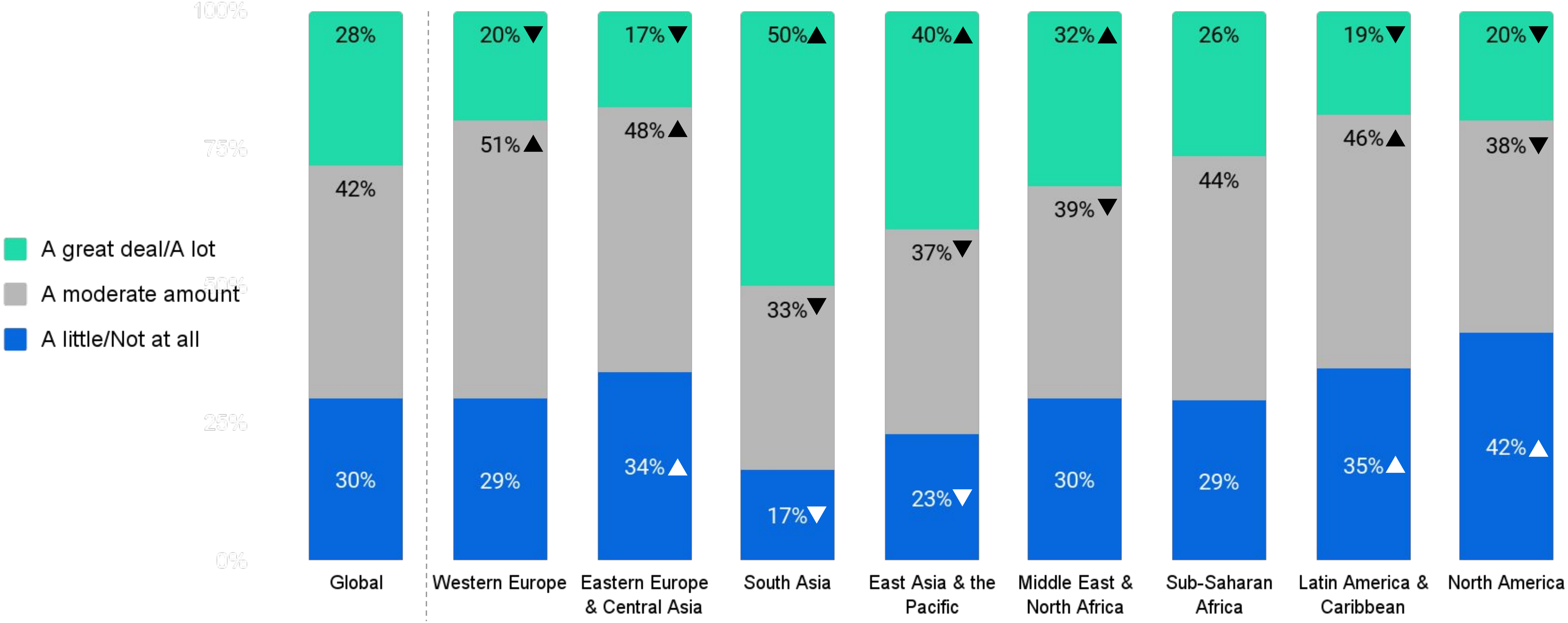
African respondents find education to be especially impactful compared to other regions. Virtually all respondents believe business leaders have some responsibility in climate change mitigation.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Trust in Sustainability Claims

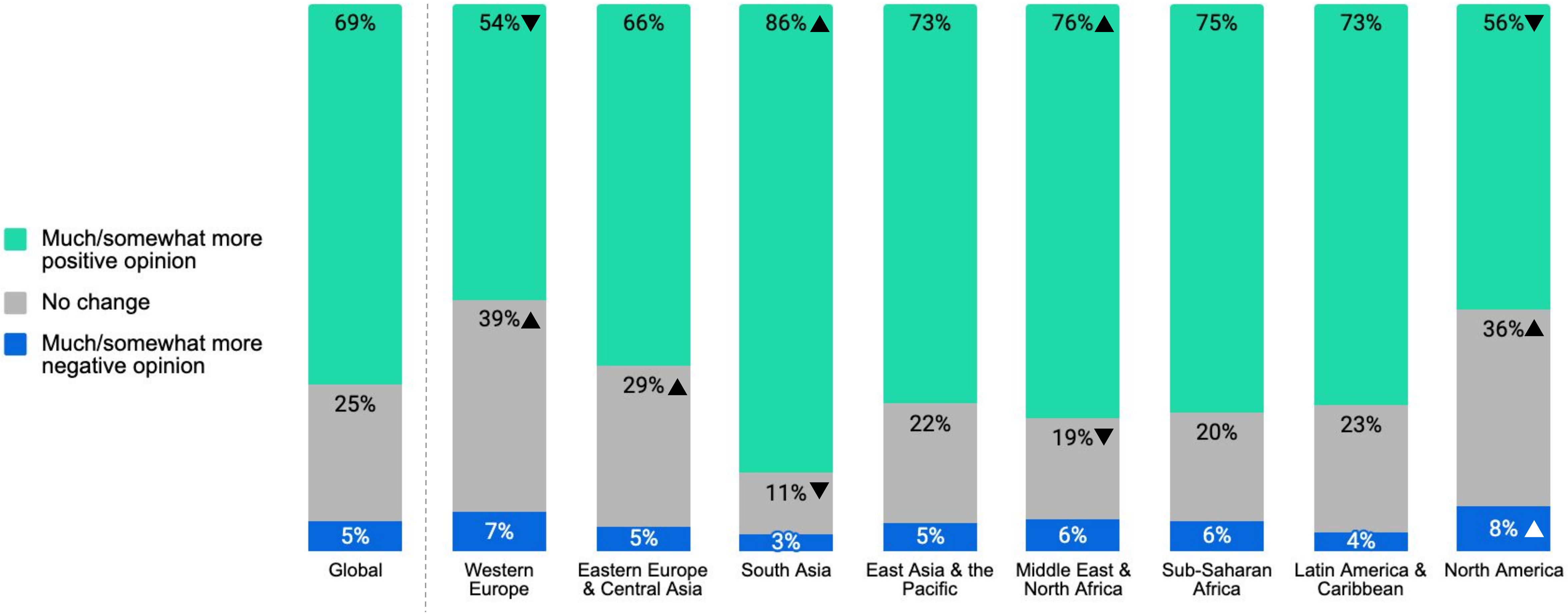
Respondents are generally split on the amount that they trust sustainable practices claimed by businesses. Asian respondents tend to be more trusting, while respondents in Europe and the Americas are more skeptical.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Opinion of ESG Programs

Although ESG programs generally have a positive effect on opinions of companies, the extent of their influence varies by region. Those in South Asia and MENA are more likely to think favorably, while European and North American respondents are more likely to have no change in opinion.

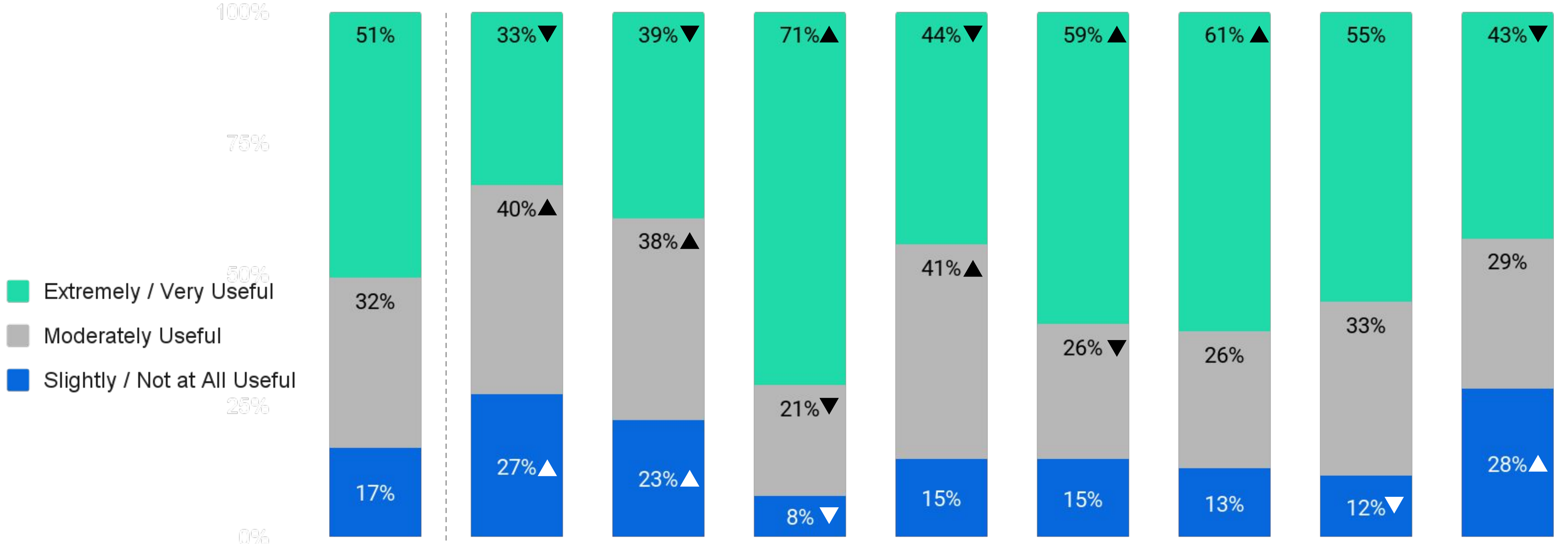


Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Usefulness of ESG Metrics

Of the corporate respondents who use ESG metrics, those in South Asia are most likely to find them useful.



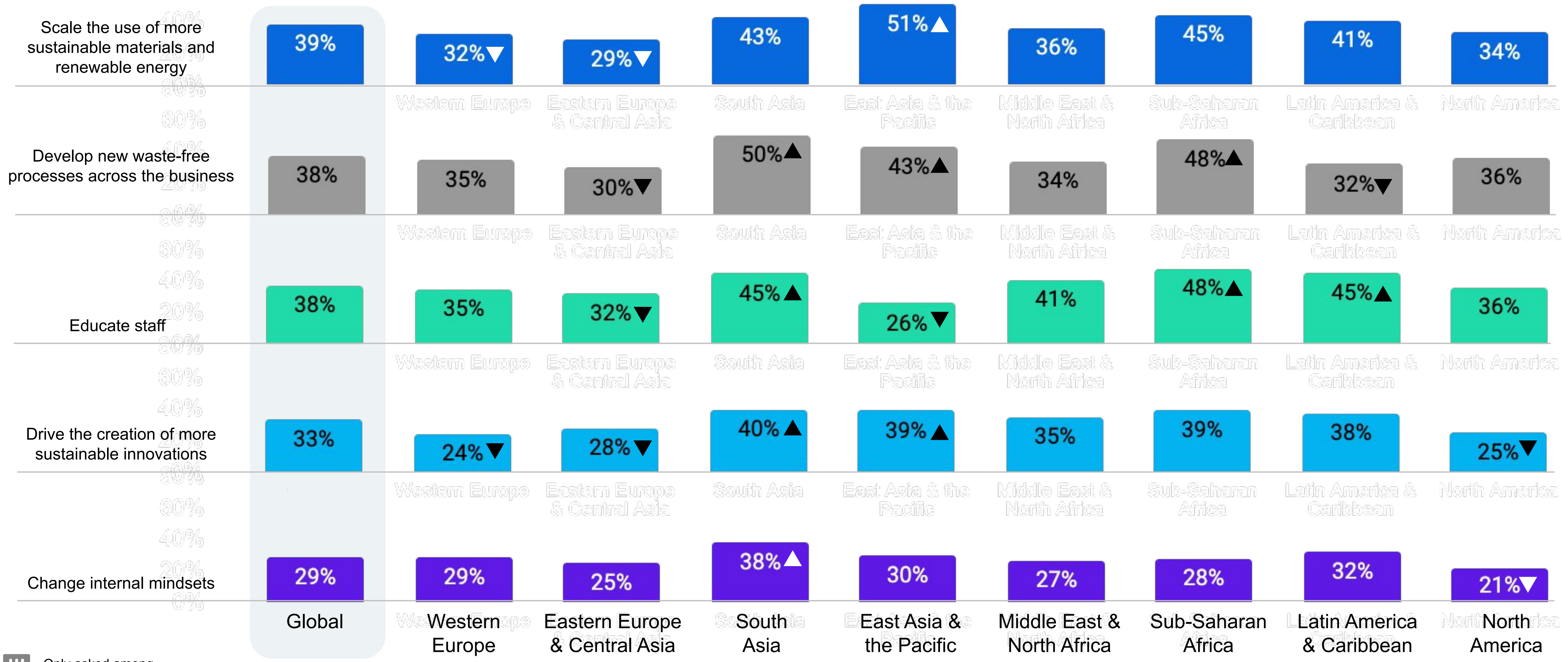
	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Don't Use	9%	10%	15% ▲	2% ▼	5% ▼	5% ▼	9%	5% ▼	19% ▲
Don't Know	7%	13% ▲	7%	2% ▼	6%	3% ▼	5%	6%	14% ▲

Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Top Business Priorities

Sustainable materials and waste-free processes are among the top priorities for organizations, especially in South and East Asian countries.

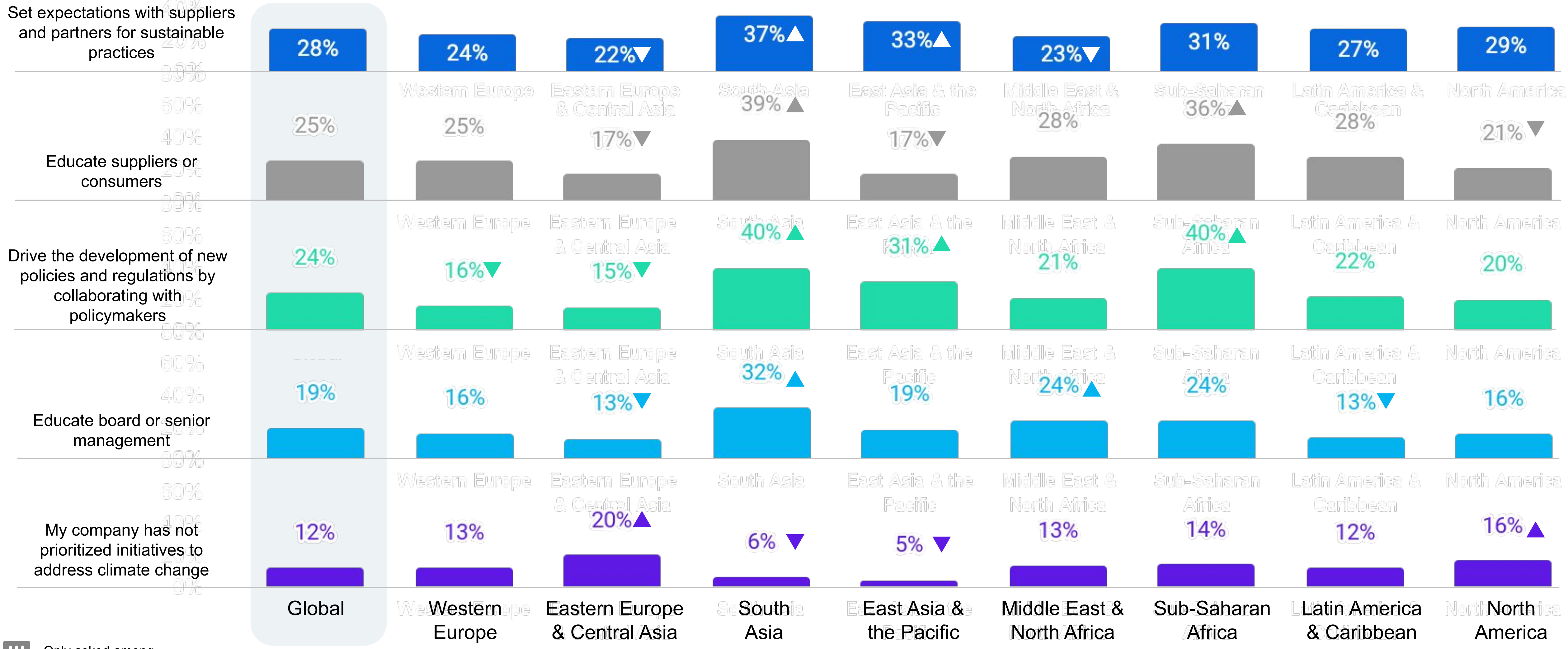


Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Top Business Priorities, ctd.

Eastern European and Central Asian respondents are most likely to state that their company has not prioritized climate change initiatives.

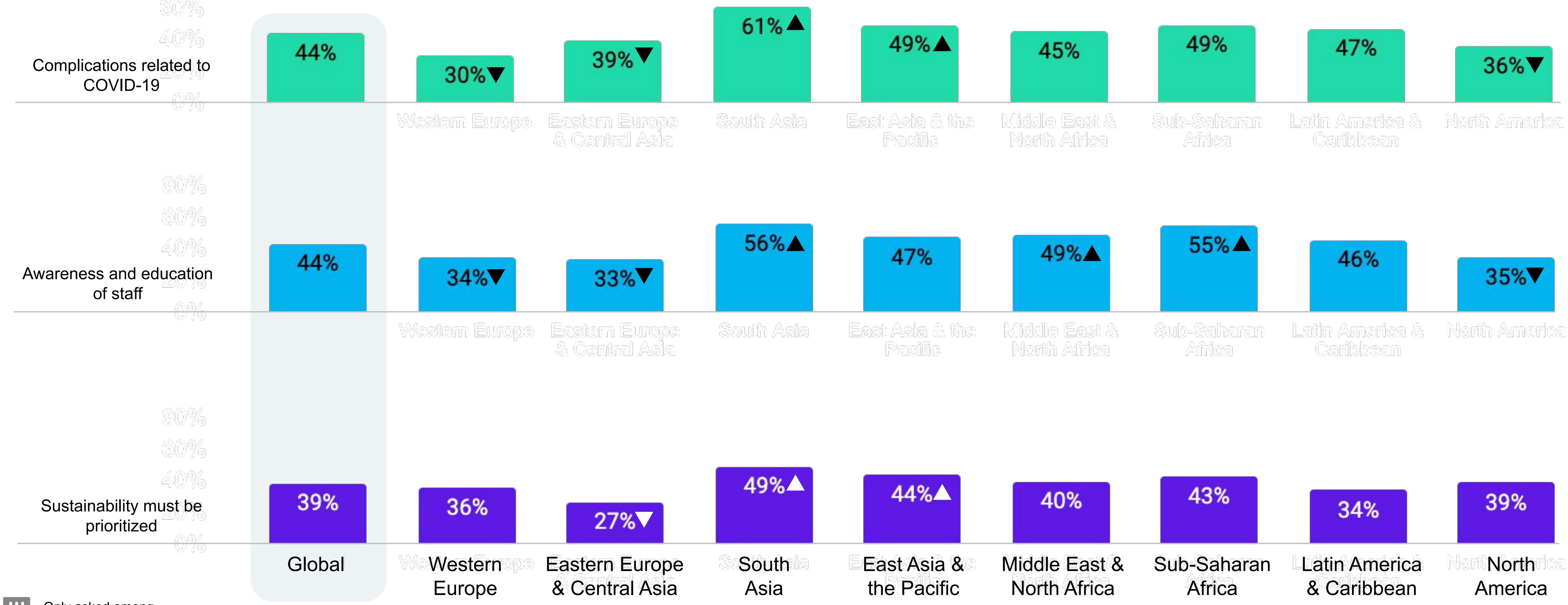


Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Top Business Challenges

Almost half of corporate respondents claim that COVID-19 complications and staff education/awareness have presented obstacles to meeting their organization's sustainability goals.

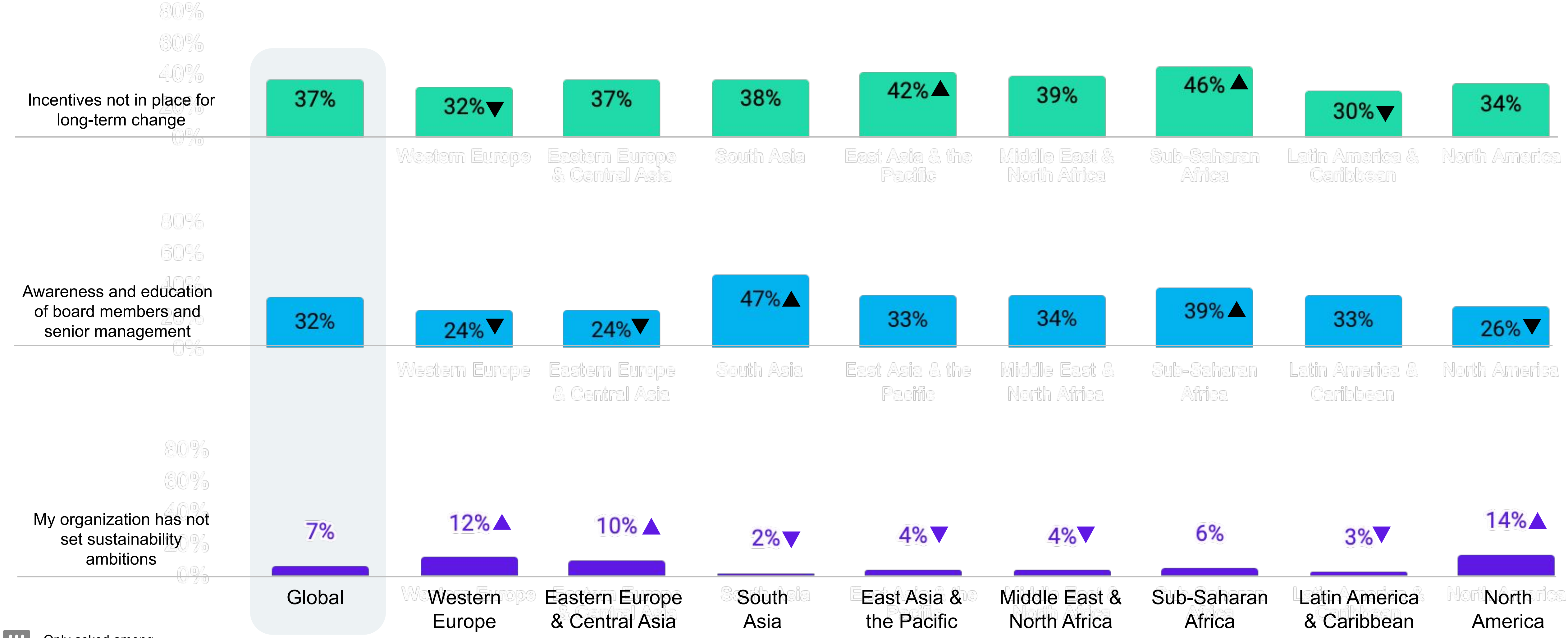


Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Top Business Challenges, ctd.

Although most organizations have sustainability ambitions, businesses in North America and Europe are more likely to not have any goals set.



Only asked among corporate respondents

Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

7

Climate Superhero

Superhero KPI Summary

Removing toxins from the air is the #1 mission across respondents globally, but cleaning the oceans is also a top priority for a few other regions. Problem-solving is unanimously seen as the most important superpower for tackling these issues.

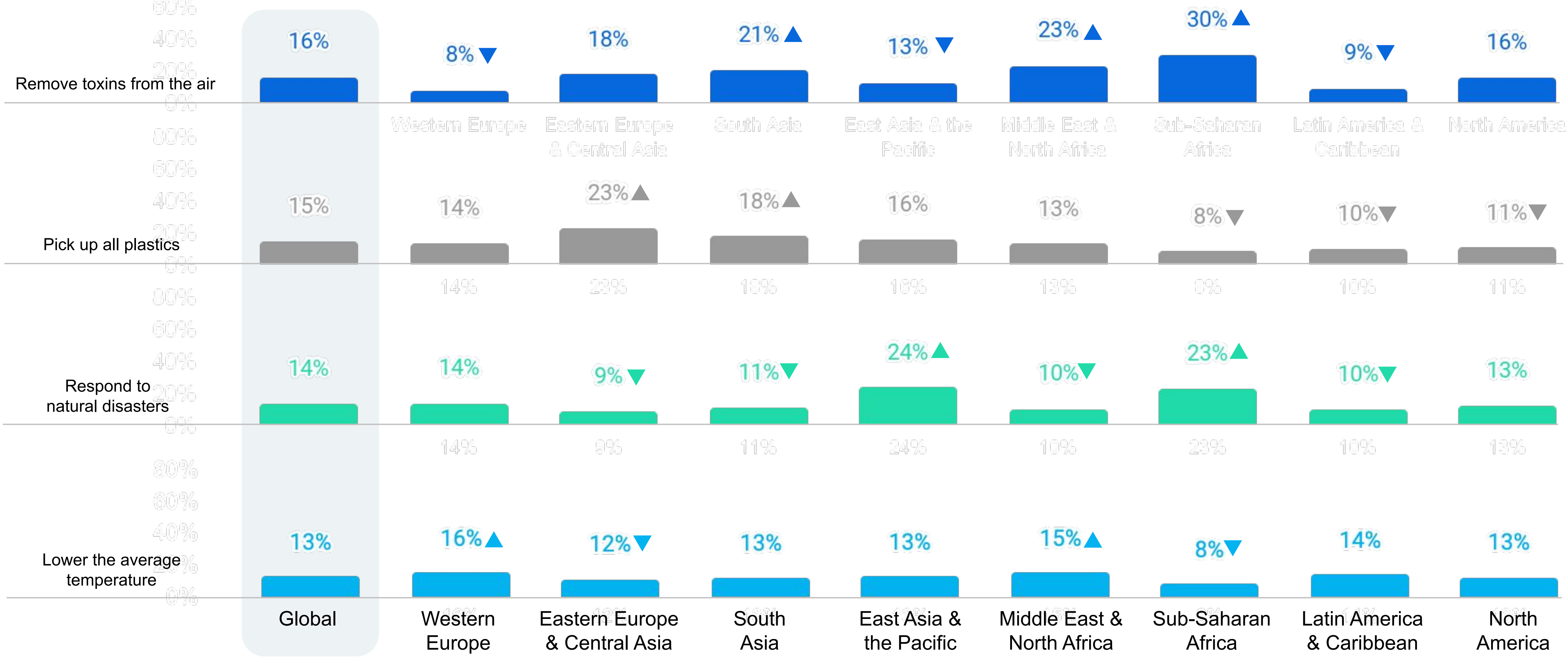
	Global	Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
Top Superhero Mission	Remove toxins from the air	**Clean the oceans**	**Pick up all plastics**	Remove toxins from the air	Respond to natural disasters	Remove toxins from the air	Remove toxins from the air	**Clean the oceans**	**Clean the oceans**
Top Superhero Power	Problem Solving	Problem Solving	Problem Solving	Problem Solving	Problem Solving	Problem Solving	Problem Solving	Problem Solving	Problem Solving

/ indicates highest/lowest KPI score across regions

Green/Red text indicates statistical significance compared to Global results at 95% confidence level

Mission

Globally, removing toxins from the air, pick-up of plastics, natural disaster response and lowering overall temperature are almost equally important missions for a climate change superhero.

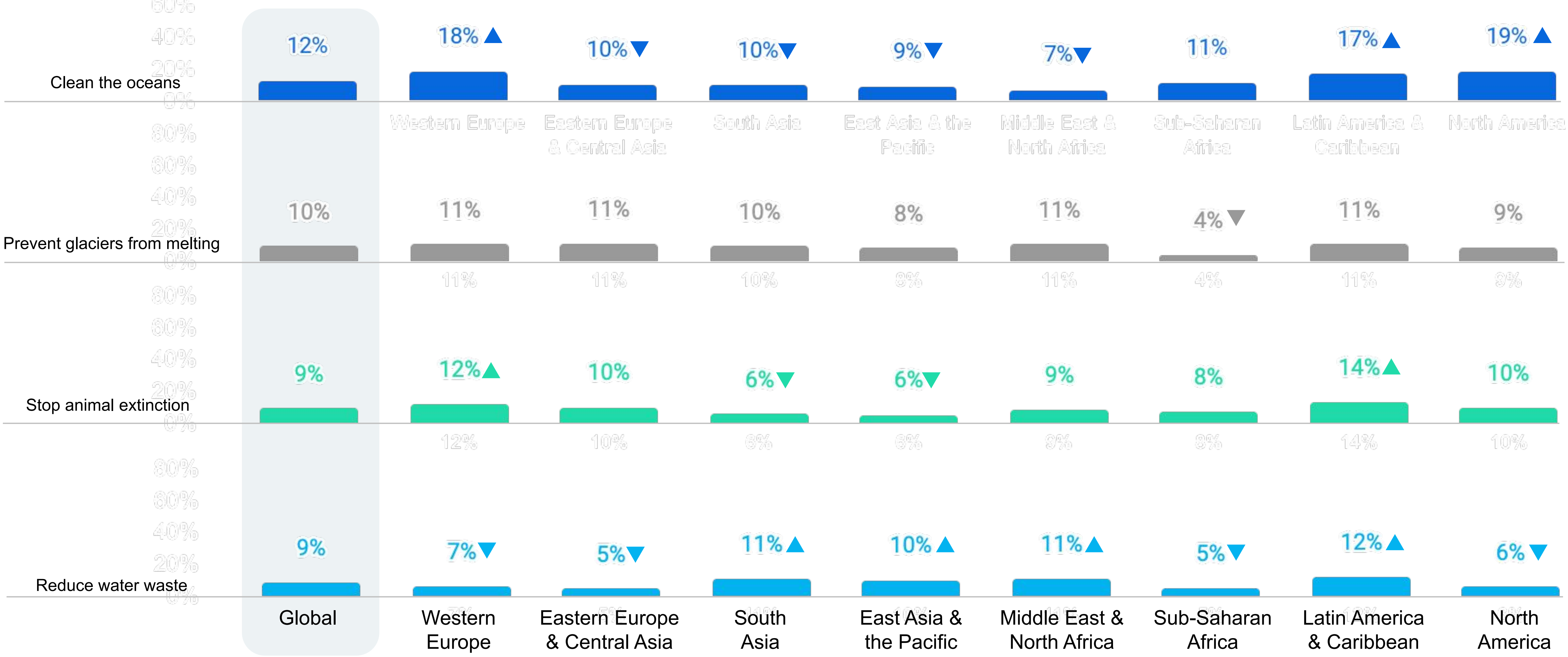


Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Mission, cont'd...

qualtrics XM + SAP

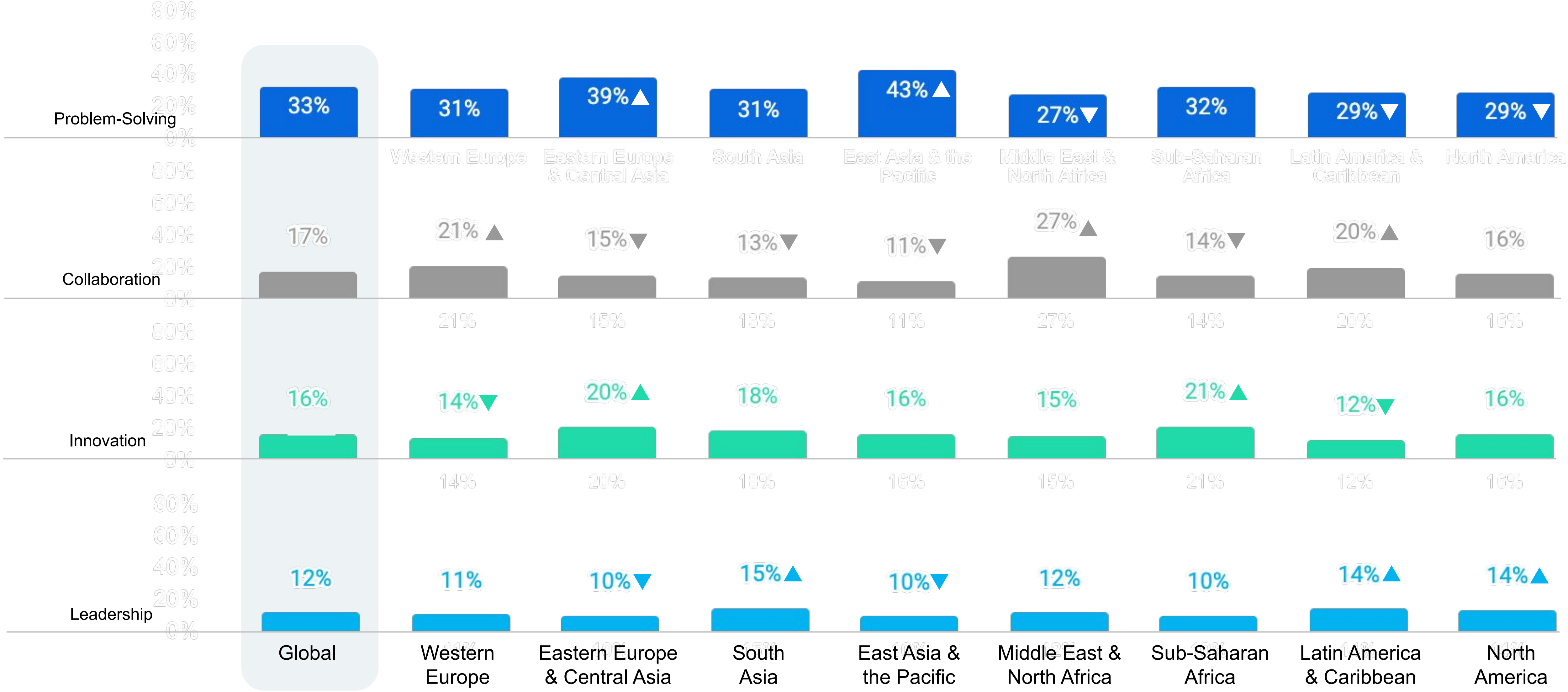
Cleaning the oceans and reducing water waste see higher variability as the #1 priority across regions. Around 1-in-10 most highly prioritized preventing glaciers from melting, although it's a significantly lower priority in Sub-Saharan Africa.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Superpower

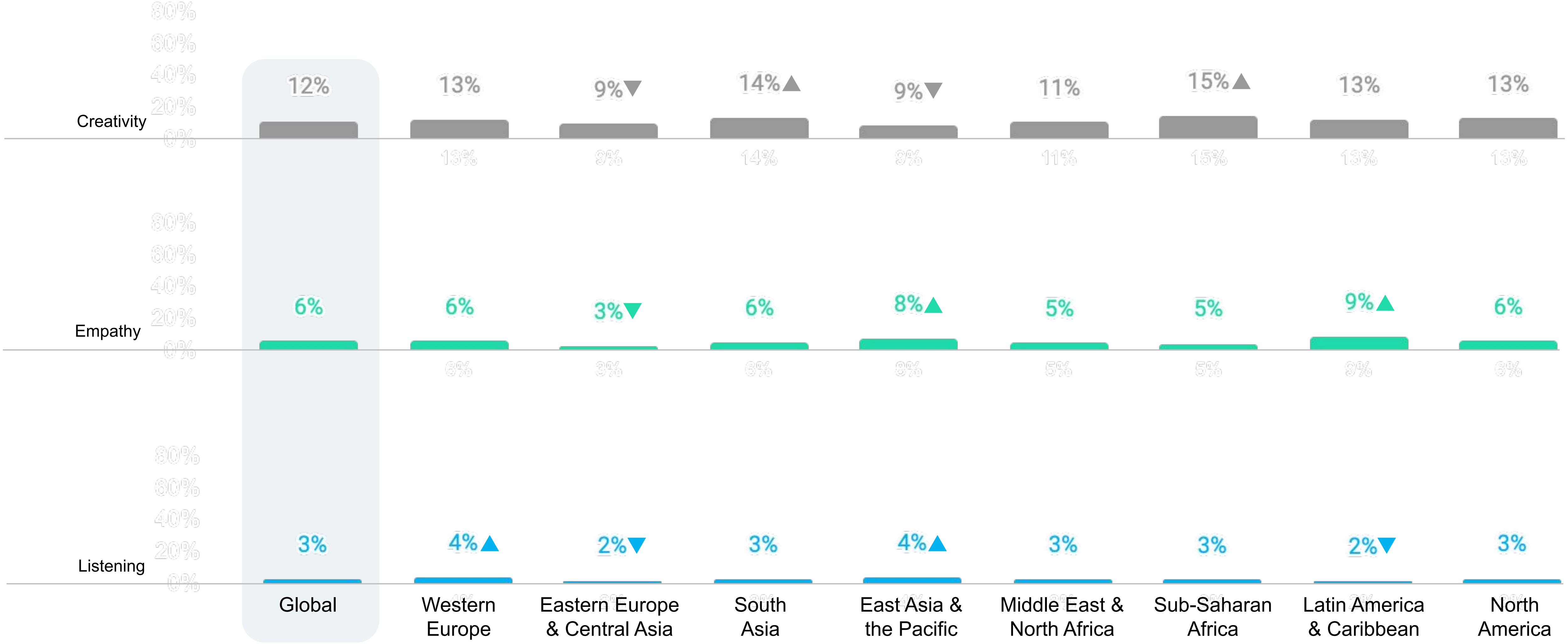
A third of respondents across the globe agree that a climate superhero would most need the power of problem-solving.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Superpower

Listening is the least important superpower, indicating that a "climate superhero" may need to be more action-oriented.



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Thank you

8 Appendix

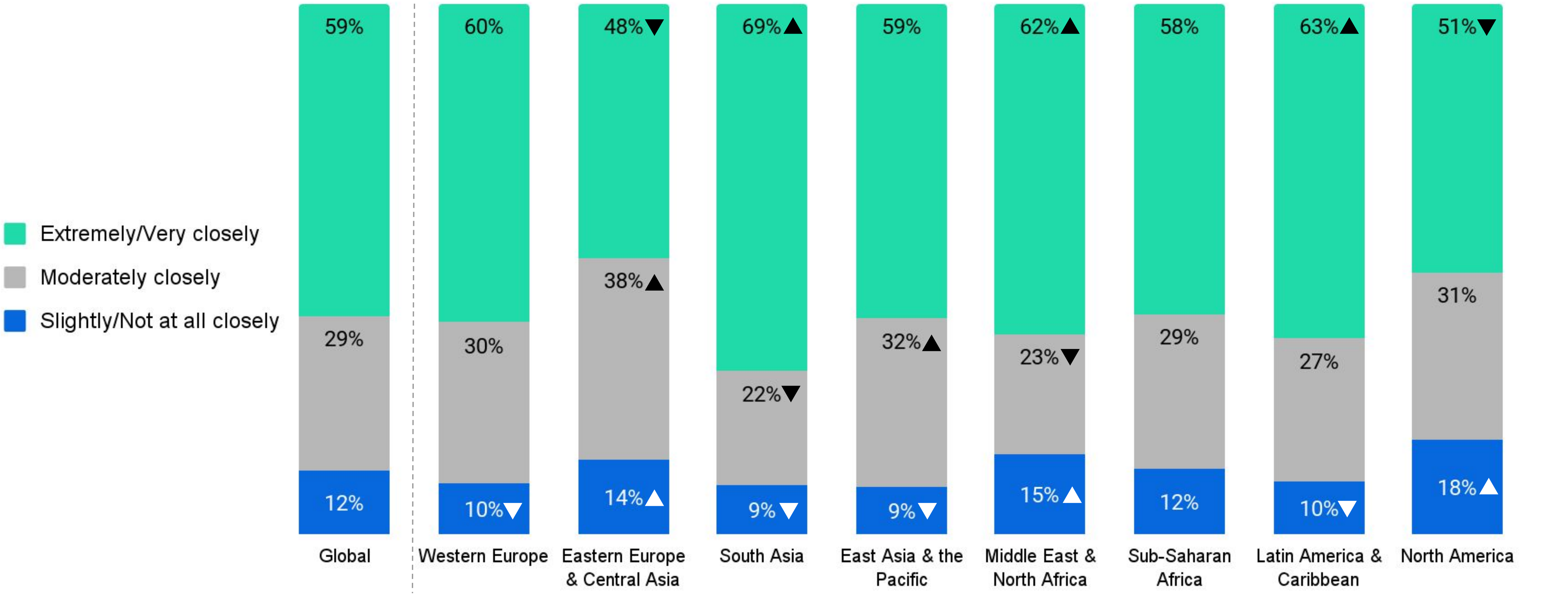
Countries per Region

Western Europe	Eastern Europe & Central Asia	South Asia	East Asia & the Pacific	Middle East & North Africa	Sub-Saharan Africa	Latin America & Caribbean	North America
n=1,680	*n=1,683*	*n=1,421*	*n=1,672*	*n=1,635*	*n=771*	*n=1,571*	*n=1,253*
France	Poland	Bangladesh	China	Algeria	Nigeria	Argentina	Canada
Germany	Romania	India	Indonesia	Egypt	South Africa	Brazil	United States
Italy	Russia	Pakistan	Japan	Morocco		Colombia	
United Kingdom	Ukraine			Saudi Arabia		Mexico	
				Turkey		Peru	

9

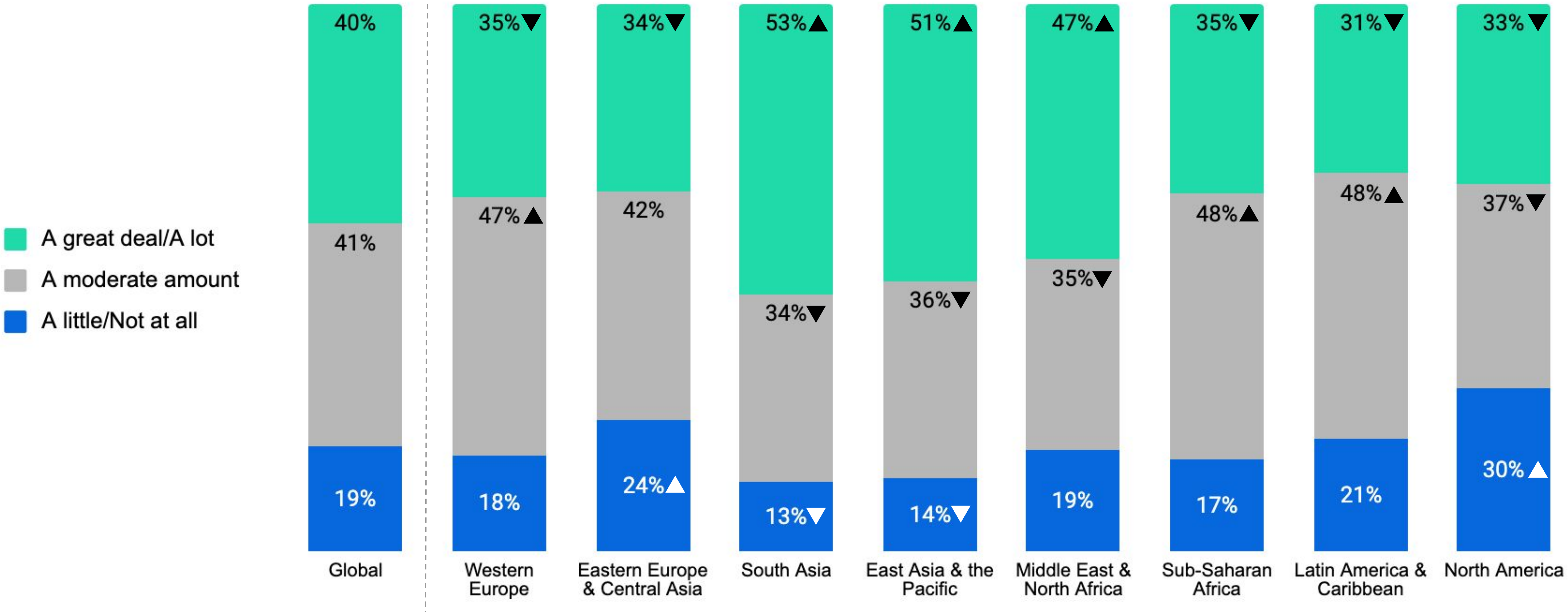
News

How closely they follow the news



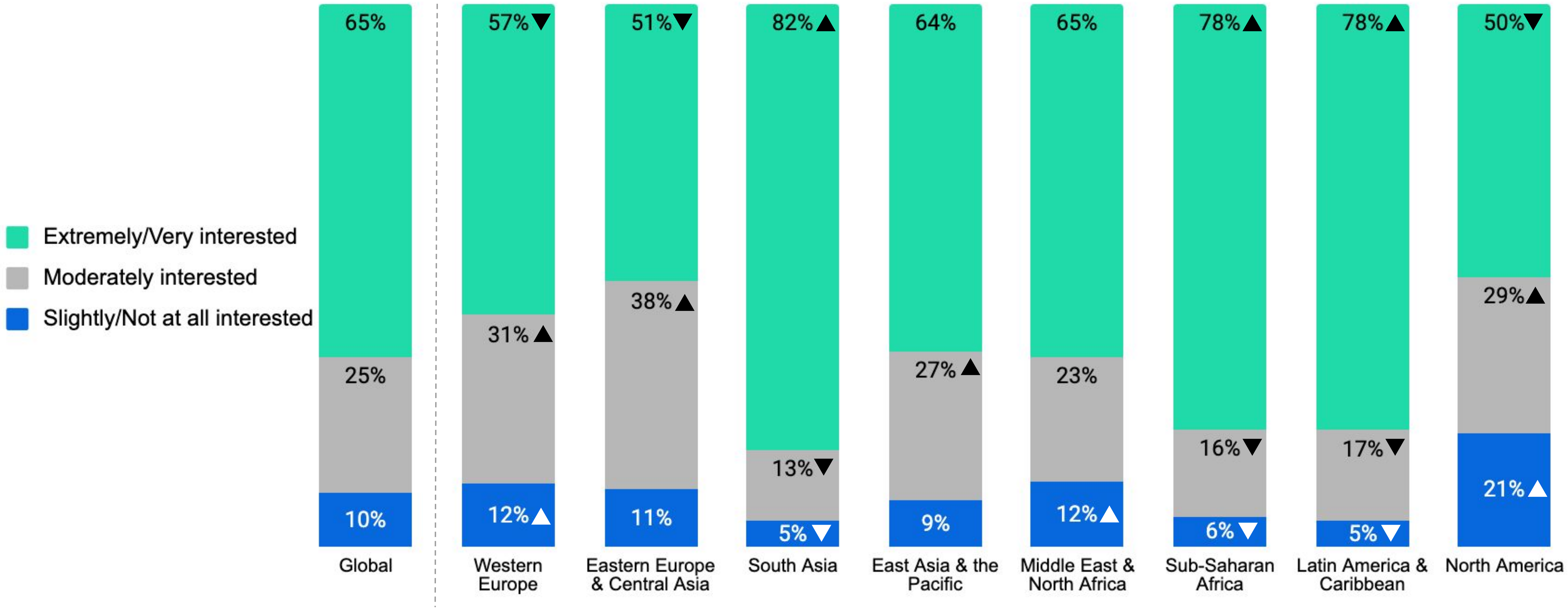
Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

How much they trust the news



Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

Interest in staying up-to-date about sustainability



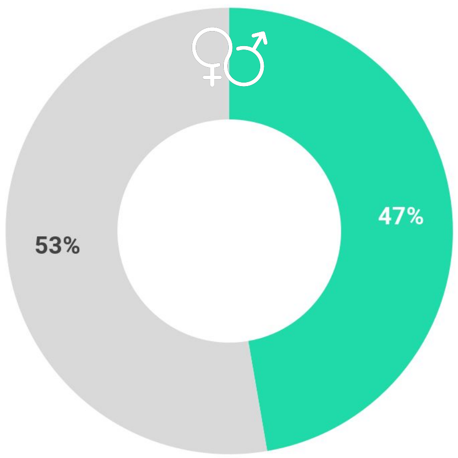
Statistically significant differences vs. Global at 95% CI indicated by ▲▼ symbols

10

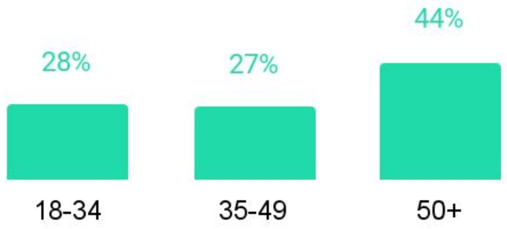
Demographics

Demographics | Western Europe

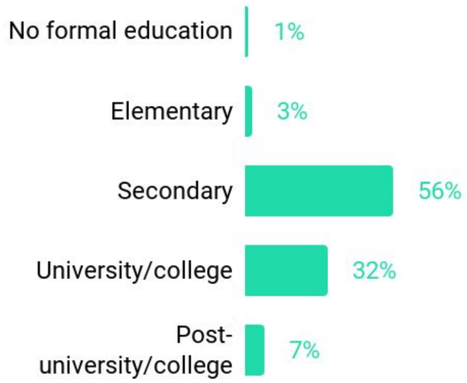
Gender



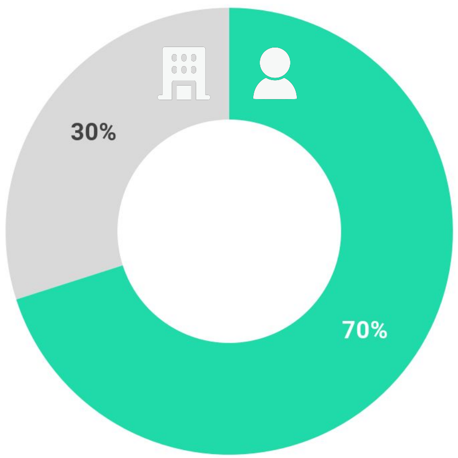
Age



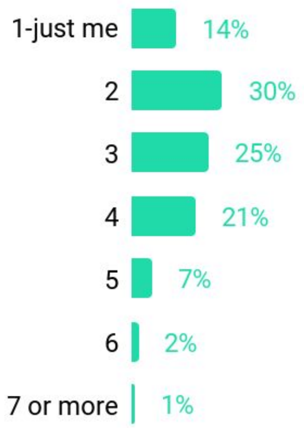
Education



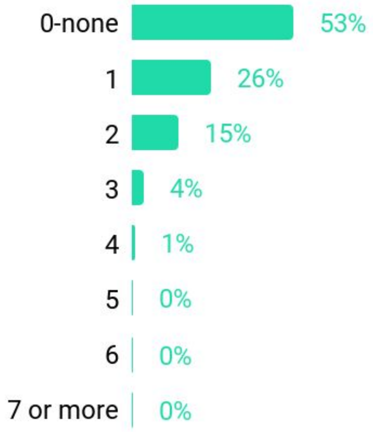
Consumer vs. Corporate



Household Size

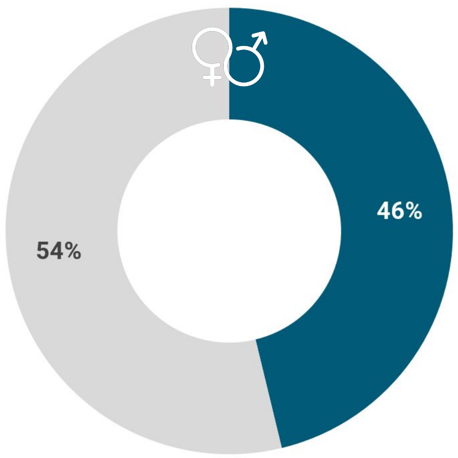


Children in Household

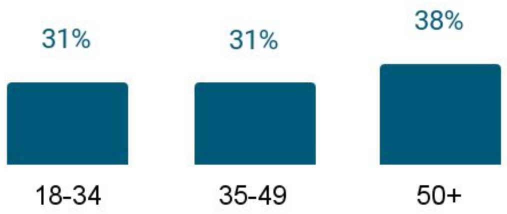


Demographics | Eastern Europe & Central Asia

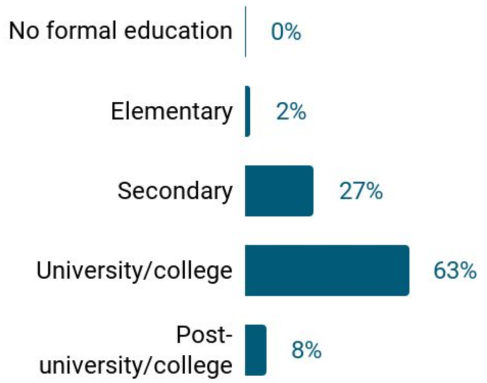
Gender



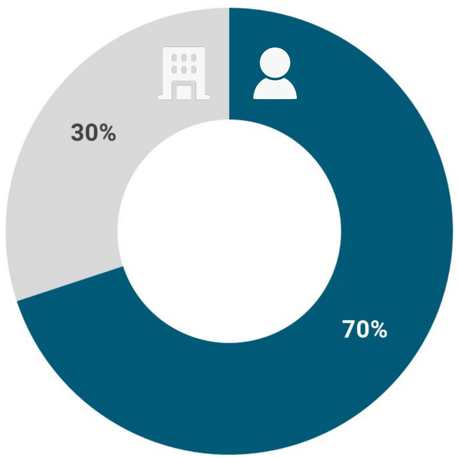
Age



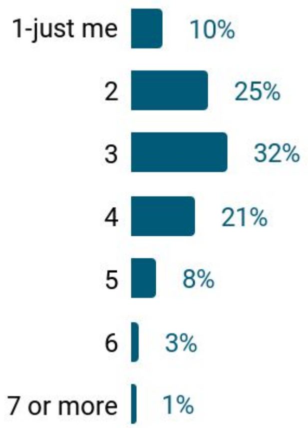
Education



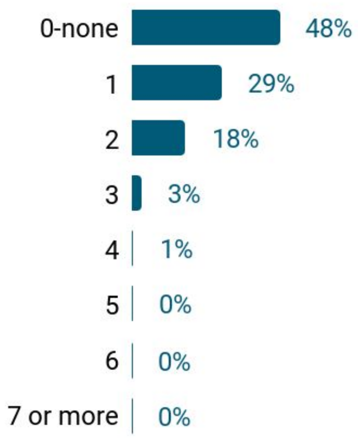
Consumer vs. Corporate



Household Size



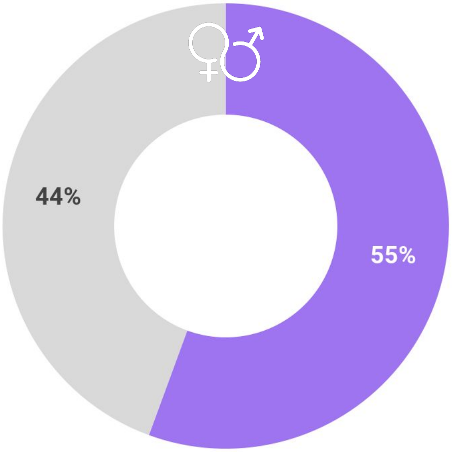
Children in Household



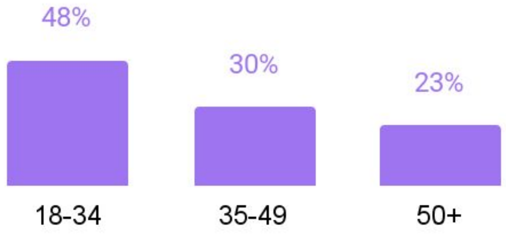
qualtrics XM + SAP

Demographics | South Asia

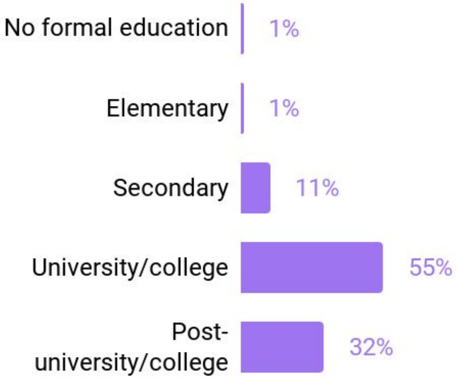
Gender



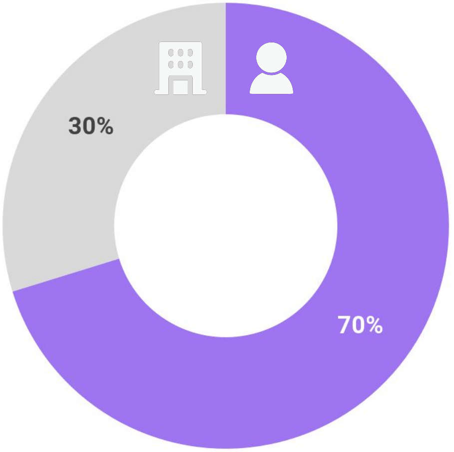
Age



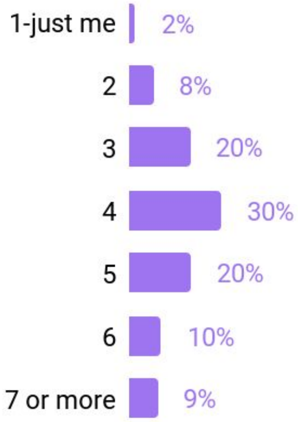
Education



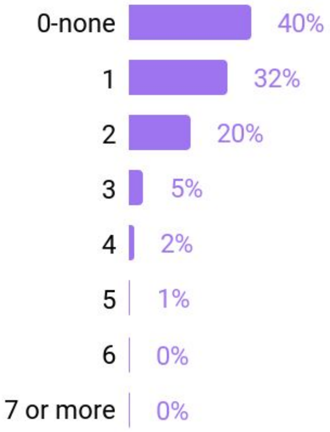
Consumer vs. Corporate



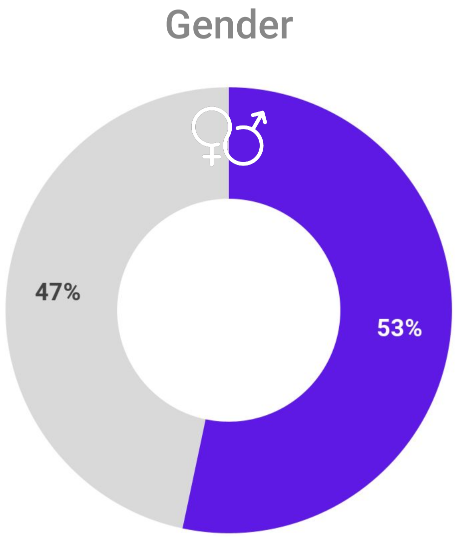
Household Size

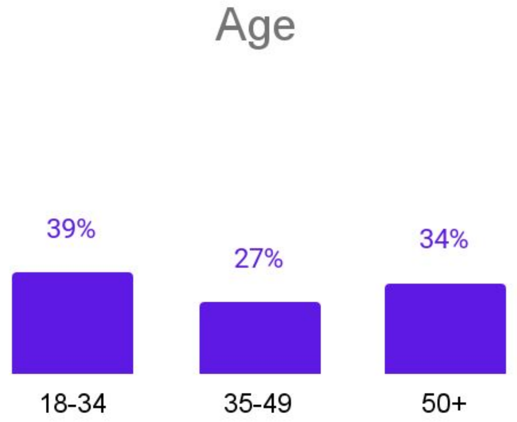


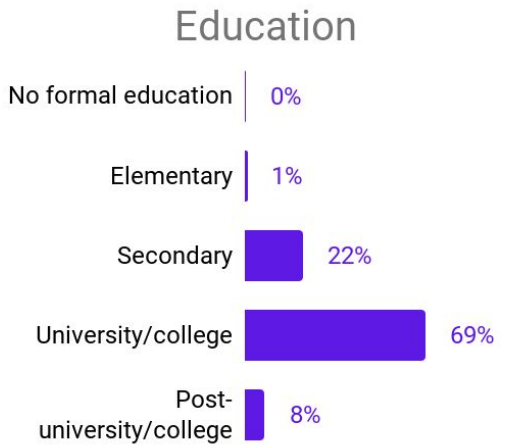
Children in Household

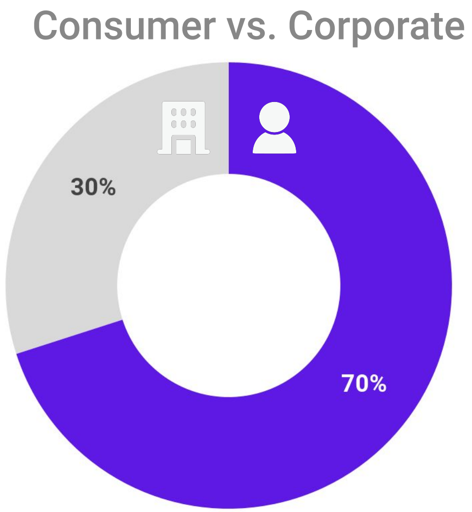


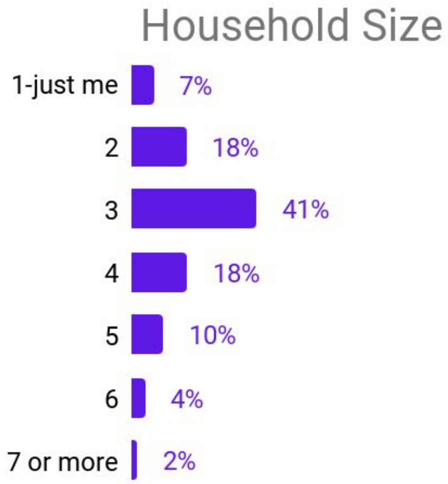
Demographics | East Asia & the Pacific

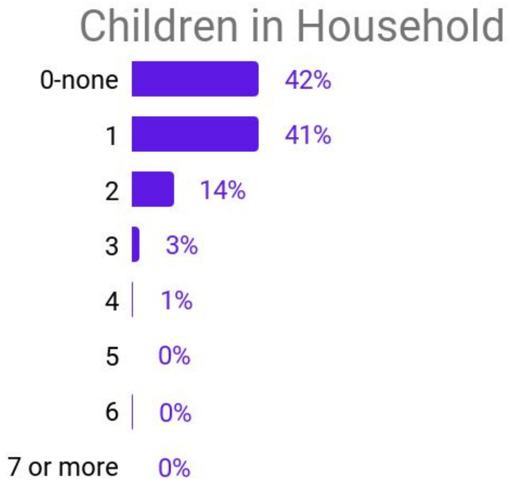






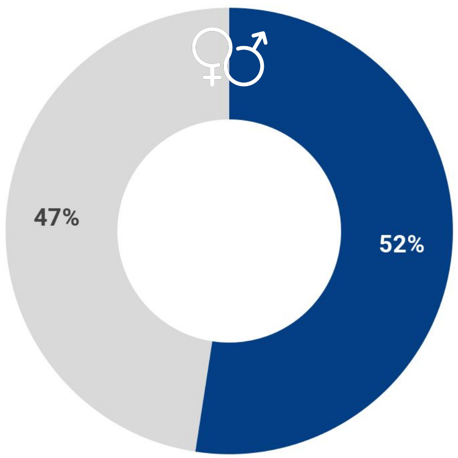




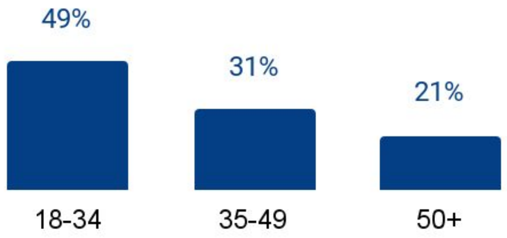


Demographics | Middle East & North Africa

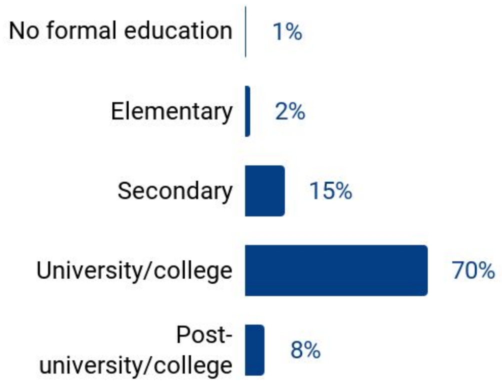
Gender



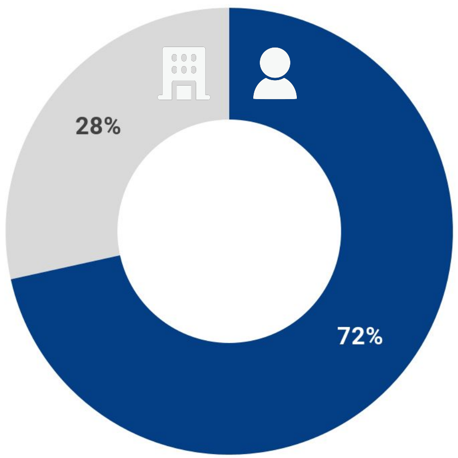
Age



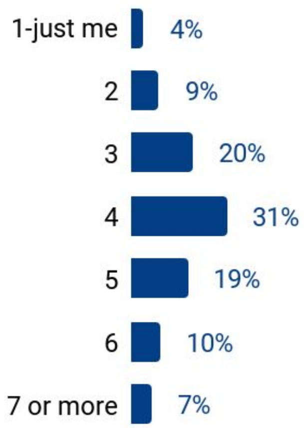
Education



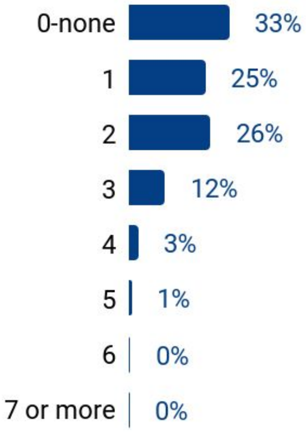
Consumer vs. Corporate



Household Size

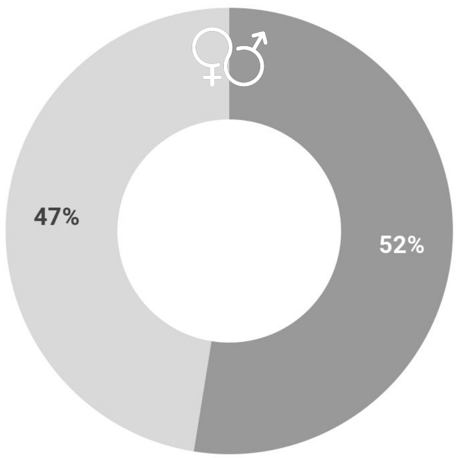


Children in Household

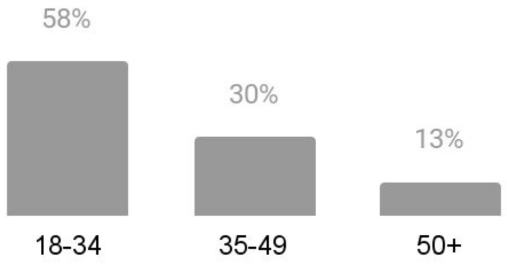


Demographics | Sub-Saharan Africa

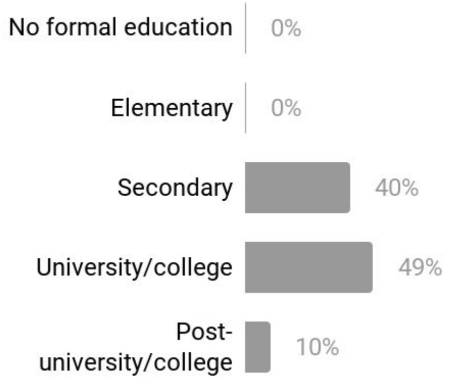
Gender



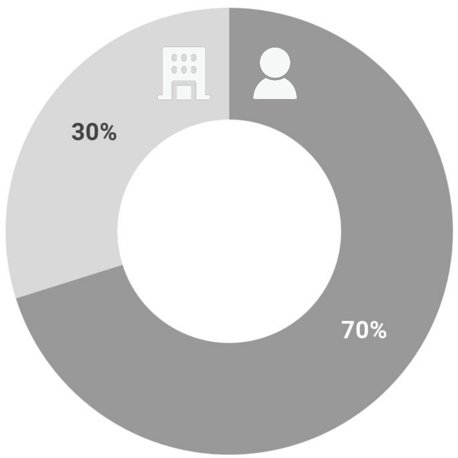
Age



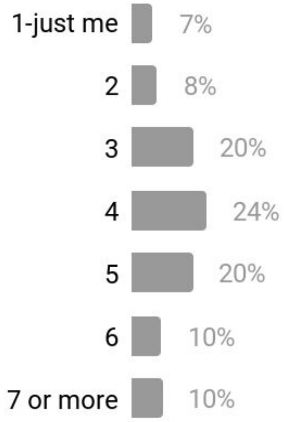
Education



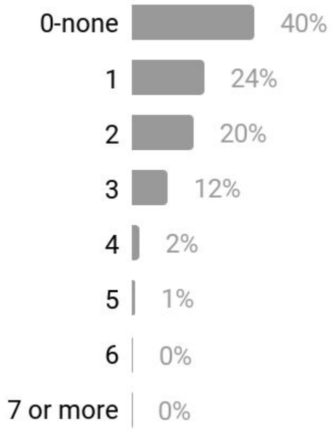
Consumer vs. Corporate



Household Size



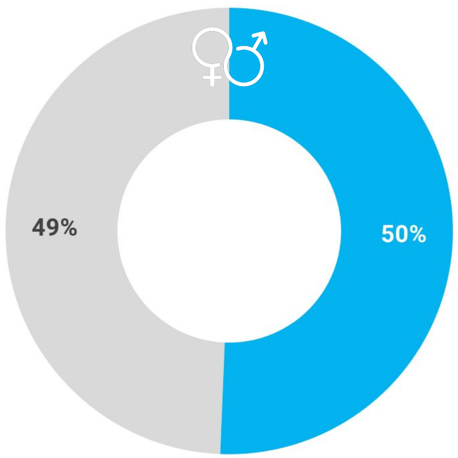
Children in Household



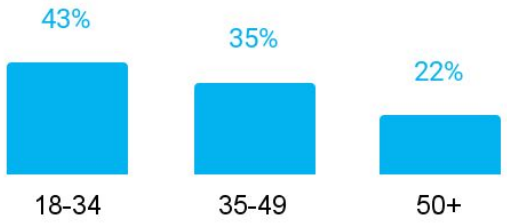
qualtrics XM + SAP

Demographics | Latin America & Caribbean

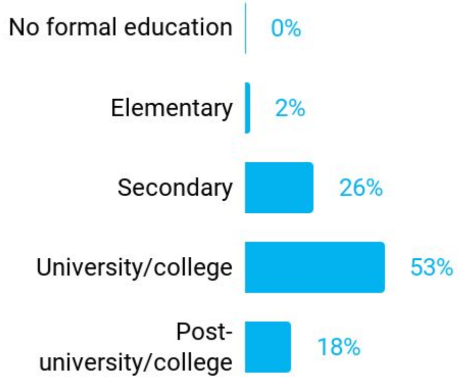
Gender



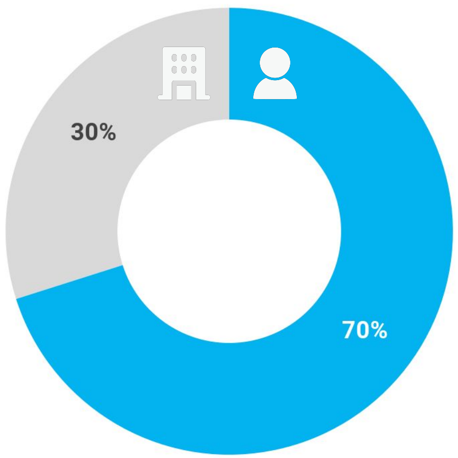
Age



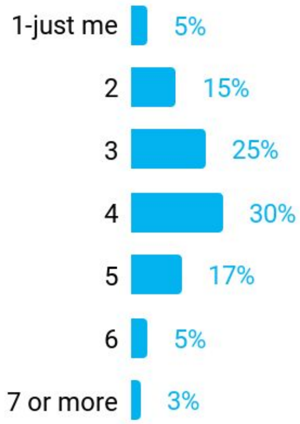
Education



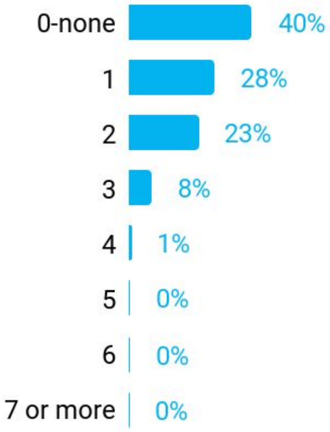
Consumer vs. Corporate



Household Size

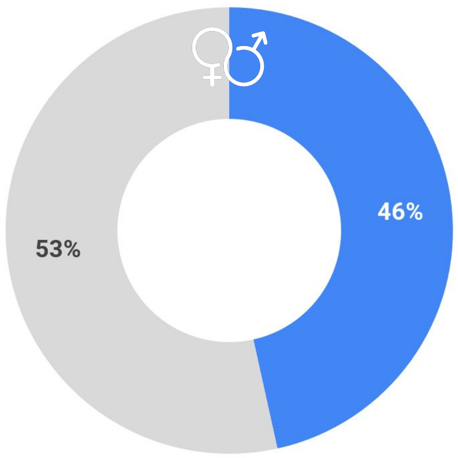


Children in Household

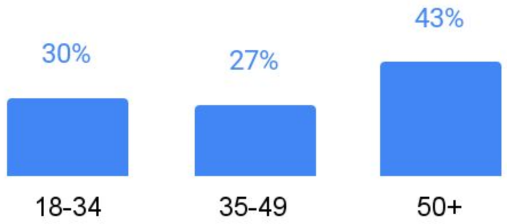


Demographics | North America

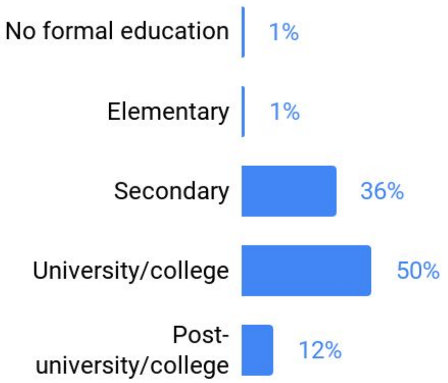
Gender



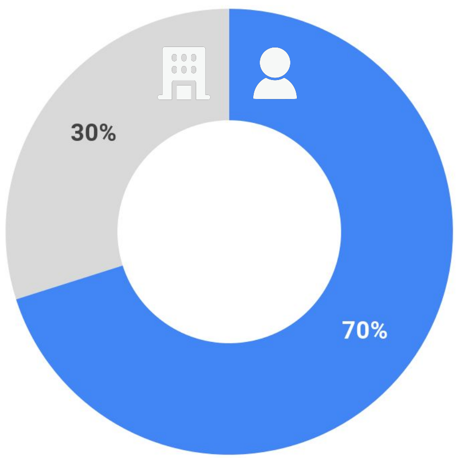
Age



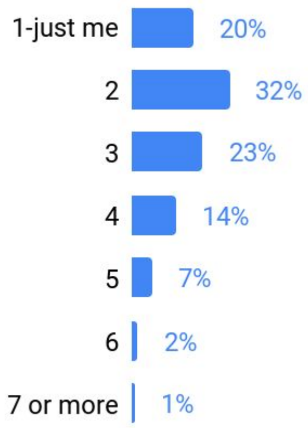
Education



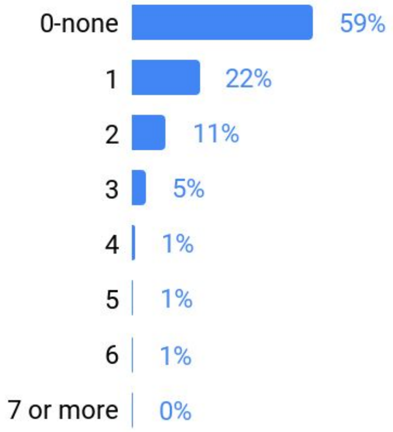
Consumer vs. Corporate



Household Size



Children in Household

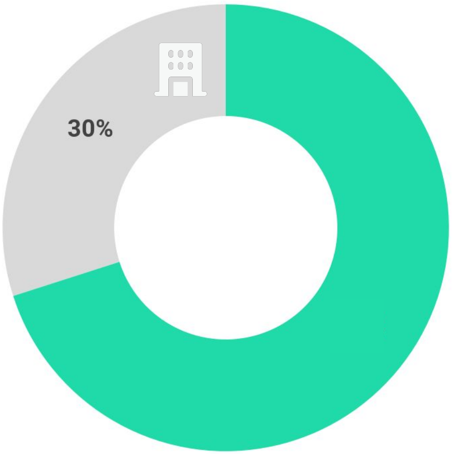


11 Corporate Profiles

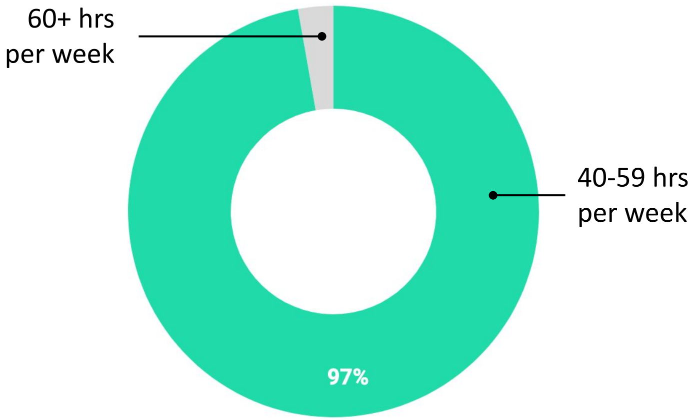
Corporate respondents work 40+ hours per week for for-profit companies

Corporate Profile | Western Europe

Corporate Respondents

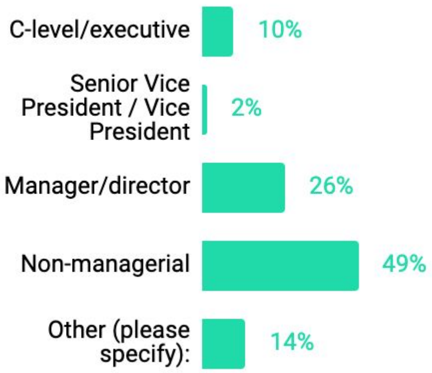


Hours per Week

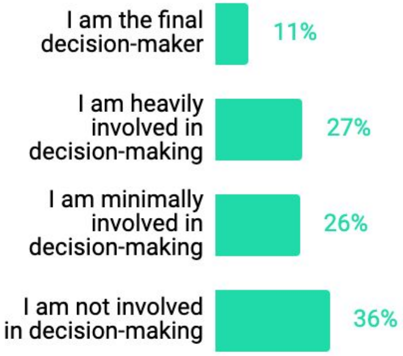


Industry	
Manufacturing	21%
Technology and Software	10%
Healthcare/Medical	9%
Professional and Business Services	8%
Retail	8%
Financial Services or Banking	6%
Restaurants or Food Service	4%
Hospitality/Travel	3%
Telecommunications	3%
Other	29%

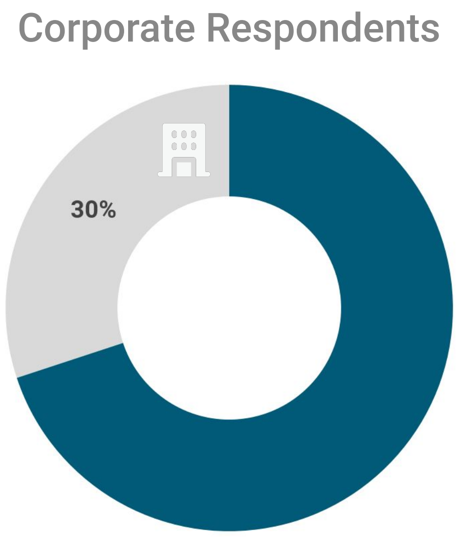
Company Role

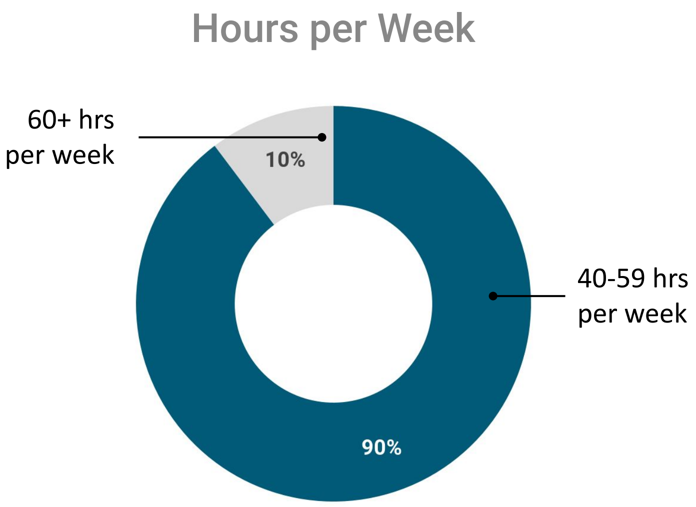


Sustainability Involvement

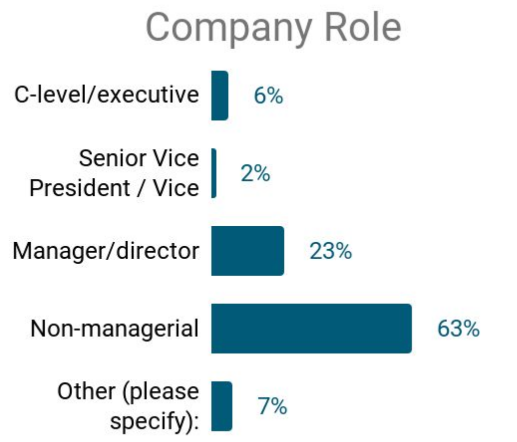


Corporate Profile | Eastern Europe & Central Asia





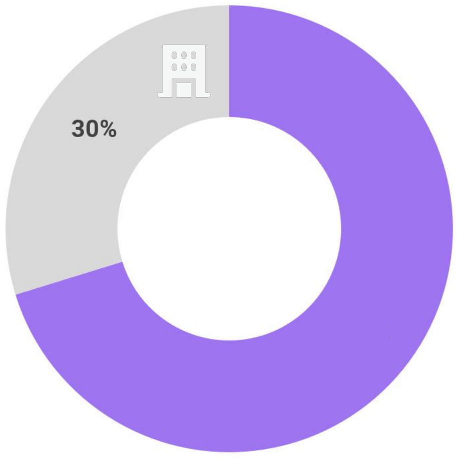
Industry	
Manufacturing	28%
Retail	14%
Technology and Software	8%
Financial Services or Banking	6%
Professional and Business Services	5%
Healthcare/Medical	5%
Telecommunications	4%
Restaurants or Food Service	3%
Hospitality/Travel	2%
Other	26%



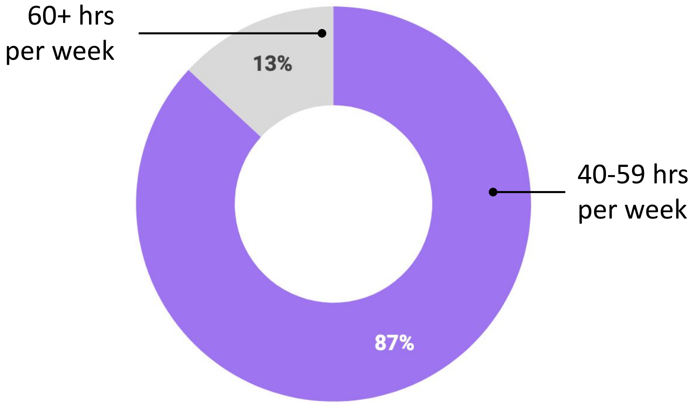
Corporate Profile | South Asia

qualtrics XM + SAP

Corporate Respondents

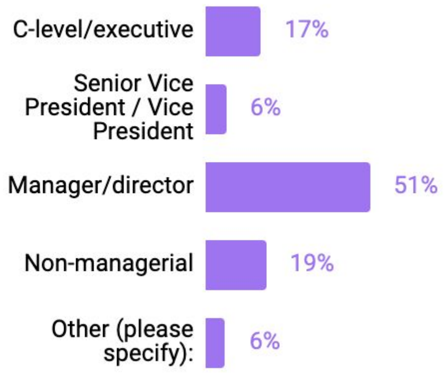


Hours per Week



Industry	
Technology and Software	25%
Manufacturing	17%
Professional and Business Services	13%
Financial Services or Banking	12%
Retail	6%
Healthcare/Medical	6%
Telecommunications	3%
Restaurants or Food Service	2%
Hospitality/Travel	2%
Other	13%

Company Role

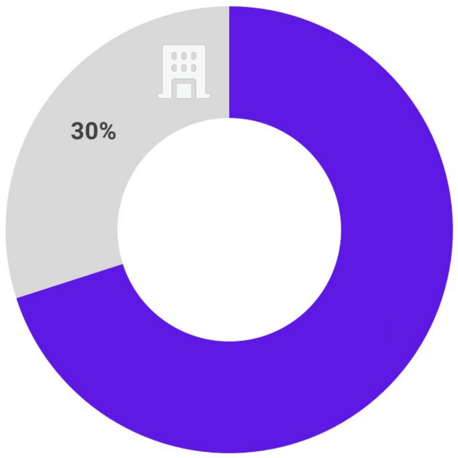


Sustainability Involvement

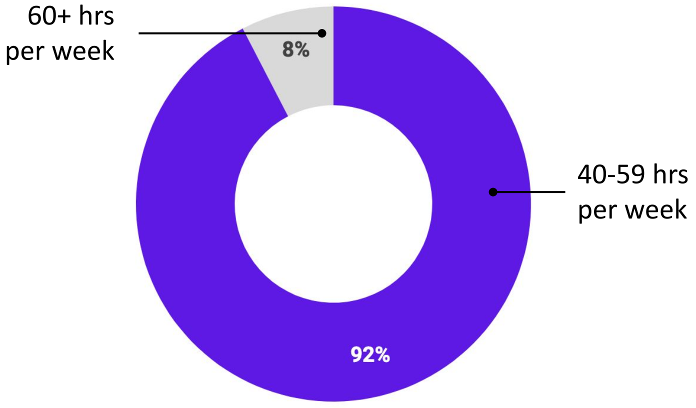
Corporate Profile | East Asia & the Pacific

qualtrics XM + SAP

Corporate Respondents

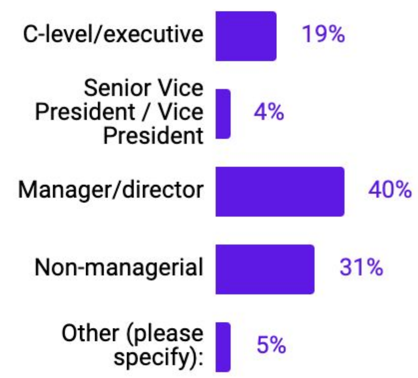


Hours per Week



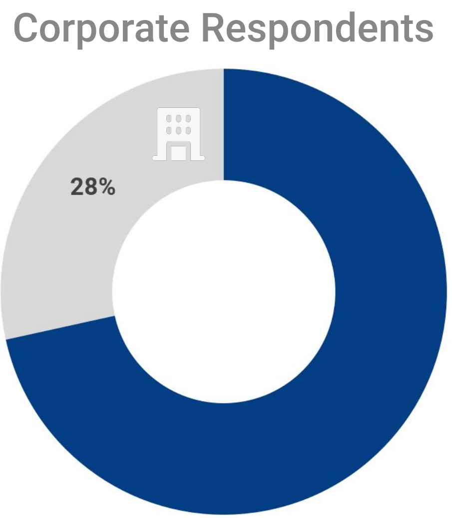
Industry	
Manufacturing	36%
Technology and Software	15%
Financial Services or Banking	9%
Retail	8%
Professional and Business Services	5%
Restaurants or Food Service	4%
Telecommunications	3%
Hospitality/Travel	2%
Healthcare/Medical	2%
Other	15%

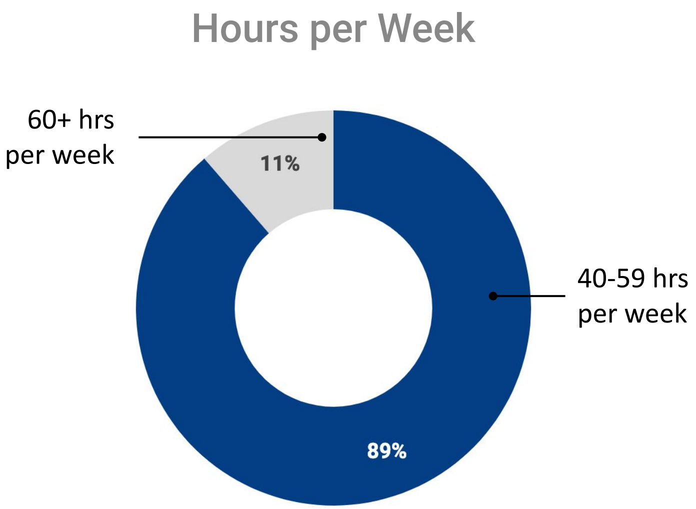
Company Role



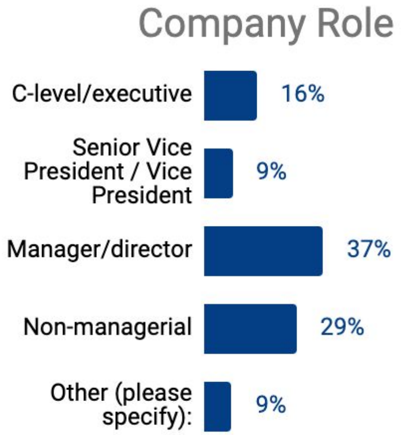
Sustainability Involvement

Corporate Profile | Middle East & North Africa





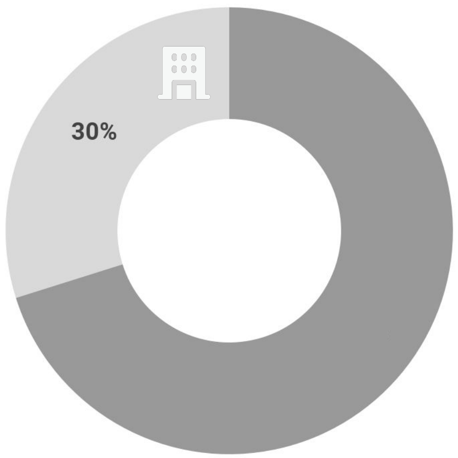
Industry	
Manufacturing	17%
Technology and Software	12%
Healthcare/Medical	9%
Financial Services or Banking	8%
Professional and Business Services	7%
Telecommunications	7%
Restaurants or Food Service	6%
Retail	5%
Hospitality/Travel	2%
Other	26%



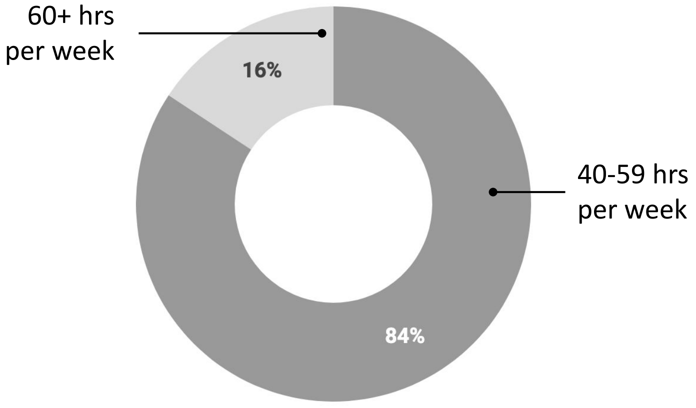
Corporate Profile | Sub-Saharan Africa

qualtrics XM + SAP

Corporate Respondents

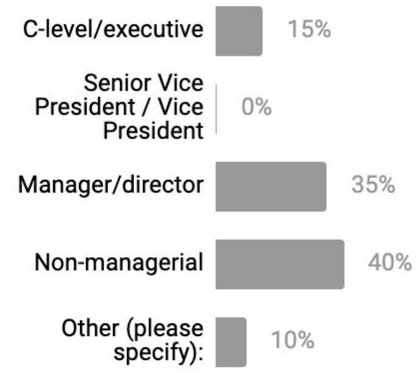


Hours per Week

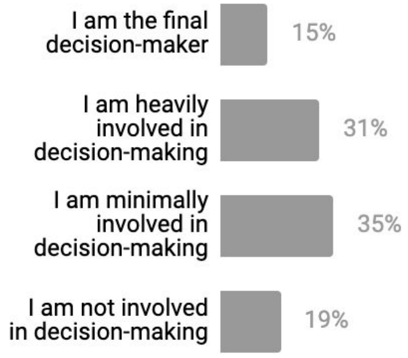


Industry	
Healthcare/Medical	17%
Technology and Software	12%
Professional and Business Services	12%
Retail	9%
Financial Services or Banking	9%
Manufacturing	7%
Telecommunications	6%
Restaurants or Food Service	2%
Hospitality/Travel	1%
Other	24%

Company Role

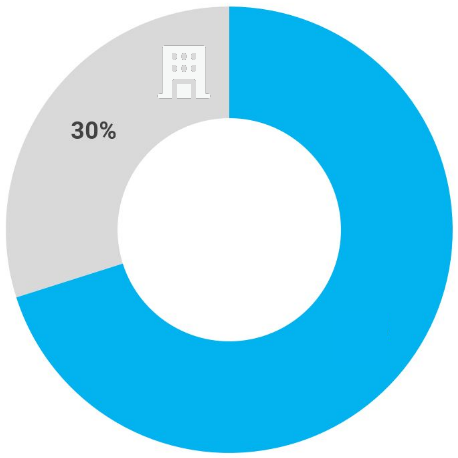


Sustainability Involvement

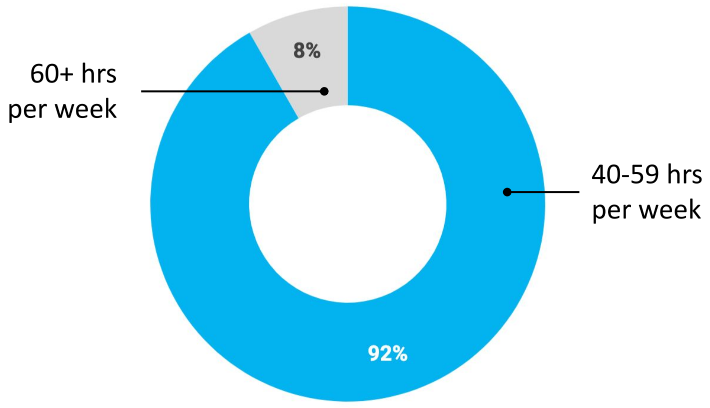


Corporate Profile | Latin America & Caribbean

Corporate Respondents

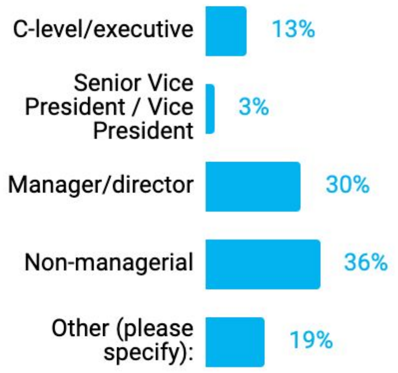


Hours per Week

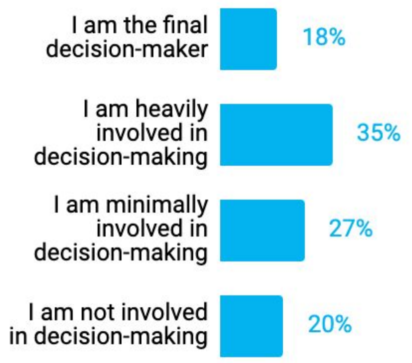


Industry	
Technology and Software	14%
Manufacturing	11%
Professional and Business Services	10%
Retail	10%
Telecommunications	8%
Financial Services or Banking	7%
Healthcare/Medical	6%
Restaurants or Food Service	4%
Hospitality/Travel	2%
Other	28%

Company Role



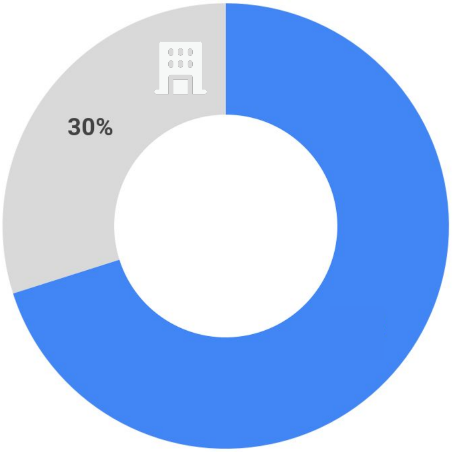
Sustainability Involvement



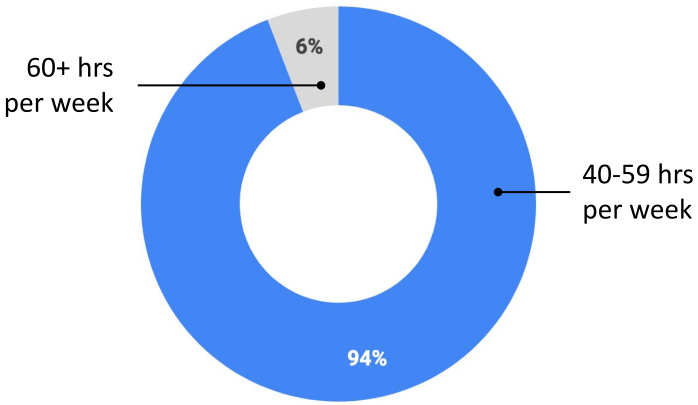
Corporate Profile | North America

qualtrics XM + SAP

Corporate Respondents

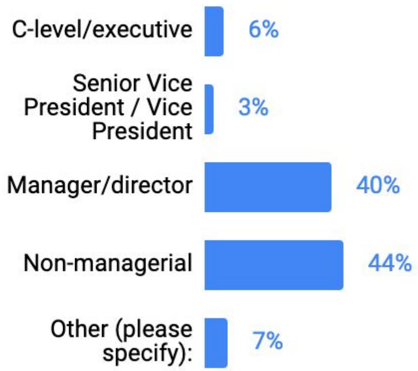


Hours per Week



Industry	
Manufacturing	20%
Retail	12%
Healthcare/Medical	11%
Technology and Software	8%
Financial Services or Banking	8%
Professional and Business Services	8%
Restaurants or Food Service	4%
Telecommunications	3%
Hospitality/Travel	3%
Other	23%

Company Role



Sustainability Involvement