

SEC Newgate

ESG Monitor

2022

Global Report

2022 RESEARCH FINDINGS

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Introduction.

It's hard to believe after the COVID years, but 2022 threw down even greater complexity for businesses seeking to respond to expectations around Environmental, Social and Governance (ESG) performance.

Last year's inaugural **SEC Newgate ESG Monitor** highlighted the growing community expectations that government and businesses do more to demonstrate meaningful impact across ESG priority areas.

This year's results show the influence of a series of global disruptions including the war in Ukraine, ongoing reverberations from the pandemic, rising energy prices and a large jump in the cost of living around the world.

The **key points** from our snapshot of attitudes across 12 key countries and territories are compelling:

- Despite the economic and geopolitical shocks of the last 12 months, globally, **people still strongly expect to see action on ESG issues**, with overall concern about ESG performance only slightly reducing. This suggests ESG is a durable ongoing community priority that is here to stay. As seen last year, we found considerable **commonality of opinion across very different societies** that the ESG values, priorities and actions of corporates and governments matter deeply.
- With cost of living instead of COVID-19 dominating the public's thinking, they are seeing the issues through **a different and more personal viewfinder**. Where last year banks represented the hard edge of ESG-issue awareness, this year there is a closer scrutiny of organisations that deliver life's 'bread-and-butter' needs, like supermarkets and energy companies.

- While environmental performance remains the single biggest driver of perceptions about companies' ESG performance, **social performance narrowly overtook environment** as the most important element in ESG performance for action. This includes caring for the vulnerable in hard economic times.
- In new questions this year, we found **some significant differences in what people expect from small and large companies**. In short, big companies need to be seen to do the right thing and be ethical, while small companies can show they are bona fides through community and causes.
- **Trust and transparency remain big issues**, with the community cynical about how honest companies and governments are about their record and a large majority wanting **more public sources of information about ESG performance** to help guide consumer choice. Conversely, people are surprisingly prepared to forgive organisations that admit their mistakes and commit to doing better.
- While most consumers still think governments and corporates should pay the costs of ESG, a substantial proportion would be **personally prepared to pay more for better ESG performance**.

These findings show the shifting ground on which corporate and political leaders are negotiating their ESG response.

Contact your local SEC Newgate office to discuss the findings and underlying data in further detail.

Background & Methodology.

This is the second year of the SEC Newgate ESG Monitor, designed to understand community awareness and perceptions around Environmental, Social and Governance (ESG) issues.

The key objectives were to measure:

- **Awareness and interest in ESG issues**, including the extent to which it influences purchases / service usage;
- **Perceived performance of governments, companies and individuals** around acting responsibly on ESG issues; and
- **Attitudes and activism on ESG issues.**

15-minute

online survey

12,063

Sample across **12 countries & territories**

The research involved a 15-minute online survey conducted with a total sample of n=12,063 citizens across 12 countries and territories as per the adjacent table.

Participants were sourced from global panel provider PureProfile, with surveys translated and completed in-language in Colombia, France, Germany, Hong Kong SAR, Italy, Poland, Sweden and United Arab Emirates. Fieldwork was conducted between mid to late July 2022.

Quotas were set by age, gender and location to ensure a nationally representative sample of citizens aged 18 or over in each country / territory. Further, the sample included an excellent mix of education levels within each country / territory. The target quotas were largely filled, but to correct for any minor variations, the final results were weighted by the actual age and gender proportions for each country / territory.

Country / Territory	2022 (n=)	2021 (n=)*
Australia	1,003	1,000
Colombia	1,018	1,039
France	1,000	1,010
Germany	1,003	1,014
Hong Kong SAR	1,004	-
Italy	1,005	1,006
Poland	1,000	-
Singapore	1,008	1,027
Sweden	1,006	-
United Arab Emirates (UAE)	1,009	-
United Kingdom (UK)	1,006	1,017
United States of America (USA)	1,001	1,031

* Japan and China have been excluded in 2022

Other methodological notes to reader:

- Survey questions and sample sizes are shown at the bottom of each page.
- Results may not always total 100% due to rounding or questions allowing multiple-responses.
- Where possible, results have been compared to the 2021 survey. Given the mix of countries and territories included in 2022 has changed, comparisons have not been included at the total level; only at a country level.
- Down ▼ and up ▲ arrows show where results for a country are significantly lower / higher than the previous year (95% confidence level).

Summary of key insights.

#01

The flow-on impacts of the COVID-19 pandemic and Ukraine war are being felt across the globe

39% of respondents

say that addressing **the rising cost of living** is a top priority for their country's future, followed by **ensuring quality, affordable healthcare** for everyone (27%) and **strengthening the economy** (27%). Acting decisively on climate change was ranked 8th out of the 23 issues tested (14% selected this a top-3 issue).

#03

People expect action on ESG, no matter how small



Importance
for companies to take
action on ESG

7.6 out of 10

78% agree that **companies have a responsibility to behave like a good citizen** and consider their impacts on other people and the planet.

71% agree that **companies should make a start on ESG action**, no matter how small.

#02

Despite the economic ructions being felt by consumers, interest in ESG issues dipped only slightly from 2021 (6.8*), with interest levels highest for social and environmental issues

Interest in ESG

(average out of 10)



46%

nonetheless cited an environmental concern as the most important ESG issue to address (unprompted), ahead of issues under the social and governance pillars / banners (at 28% and 10% respectively).

#04

And people are prepared to punish – or forgive – companies for their ESG performance, or lack thereof

1 in 2 have used or **avoided a product / service** in response to an ESG issue they care about.

3 in 5 say **slave labour or corruption** will make them boycott a company.

62% agree that **companies should be penalised for lack of action** on key ESG issues.

but

69% say they are prepared to give a company a second chance if it is transparent about its mistakes and demonstrates how it will do better in future.

Summary of key insights *cont'd.*

#05

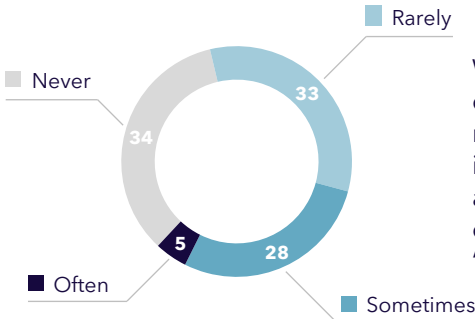
There remains a disconnect between the community and business on ESG



6.4

(average importance rating out of 10 vs. 7.6 for companies)

Despite a strong demand for corporates to take action, consumers place a lower level of importance on ESG issues in **their own day-to-day purchase decisions** - **reflecting desires for companies to just 'do the right thing.'**



While they're interested in ESG and want companies to communicate more, the majority are just not out looking for information. Just **1 in 3** (33%) claim to have actively researched company ESG activities or performance, with just 5% doing so 'often.'



Less than 1 in 10 (9%) **trust what companies claim** about their ESG activities and performance. Half don't trust them (51%) and a further 40% say they neither agree nor disagree.

#06

Companies stand to gain from better communicating their ESG efforts

How informed people feel about companies' ESG activities and performance

Average out of 10



72%

Agree that **companies should communicate the results of their ESG efforts more clearly** for consumers and investors.

71%

Agree that **there should be a consistent approach** for companies to report their ESG performance.

Summary of key insights *cont'd.*

#07

Companies generally receive lukewarm ESG performance ratings

Performance when it comes to ESG issues (average out of 10)



#09

Action on environmental issues is key to shifting community perceptions of company ESG performance

Driver modelling also shows that **action on environmental issues is the key driver of community perceptions** for small and large companies alike.

For smaller companies, **supporting causes and communities** in need is also a key factor, while for larger companies, **behaving ethically and doing the right thing** will be very important in building ESG credentials.

#08

Some industries are thought to be performing better than others on ESG

Top 3
(average out of 10)

- #01 Healthcare (6.2)
- #02 Supermarkets / grocery stores (6.2)
- #03 Education & training (6.2)

Bottom 3
(average out of 10)

- #01 Mining & resources (5.2)
- #02 Chemical (5.2)
- #03 Alcohol (5.3)

#10

Most consumers expect improved ESG performance to be funded by companies, but a substantial proportion are willing to share in the costs (likely only a little though)

71% agree that **companies can be profitable while also performing well on ESG.**

67% agree that **companies should not pass on the cost for better ESG performance** to their customers.

But... **46%** are **prepared to pay more** for stronger ESG performance.

SECTION 1

Where does ESG fit in?

Where does ESG fit in?

The rising cost of living is sharply in the spotlight as the number one priority issue for people around the globe this year.

This is closely linked to other key priorities such as the perceived need to focus on strengthening economies, ensuring quality, affordable healthcare, and providing affordable food and energy supplies.

In addition to managing costs, there is a strong community focus on environmental concerns, including acting on climate change, transitioning to renewables / clean energy, and protecting the natural environment and wildlife.

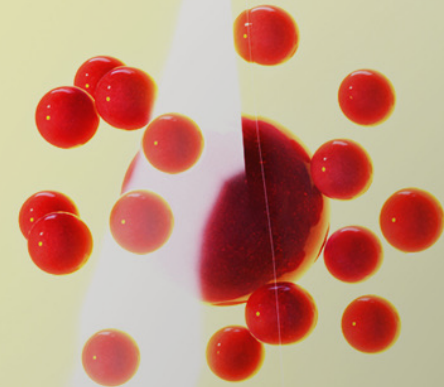
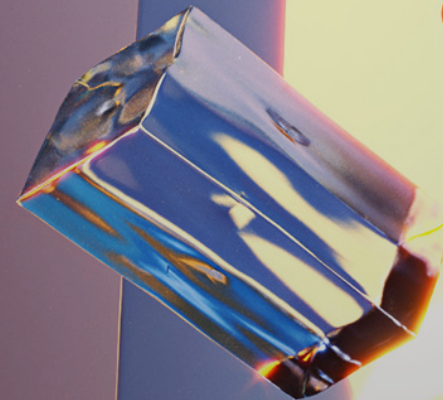
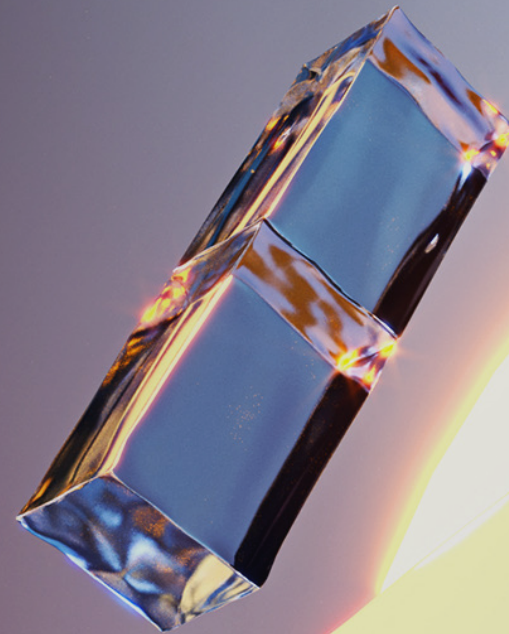
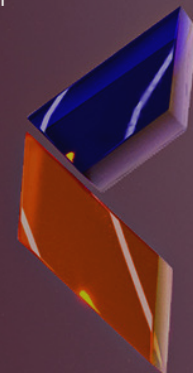
Consumers are, however, largely prioritising immediate personal needs such as price, quality and convenience over more altruistic values and priorities.

So, what does this mean for companies around the word?

Although consumers are concerned about key ESG-related issues and are keen for companies to act more responsibly, they are highly conscious about the rising cost of living and the potential impacts of ESG improvements on their own pocket.

Companies need to keep the implications for the end-consumer in mind when acting on ESG issues, avoiding the need to pass on unnecessary costs - and identifying cost efficiencies wherever possible.

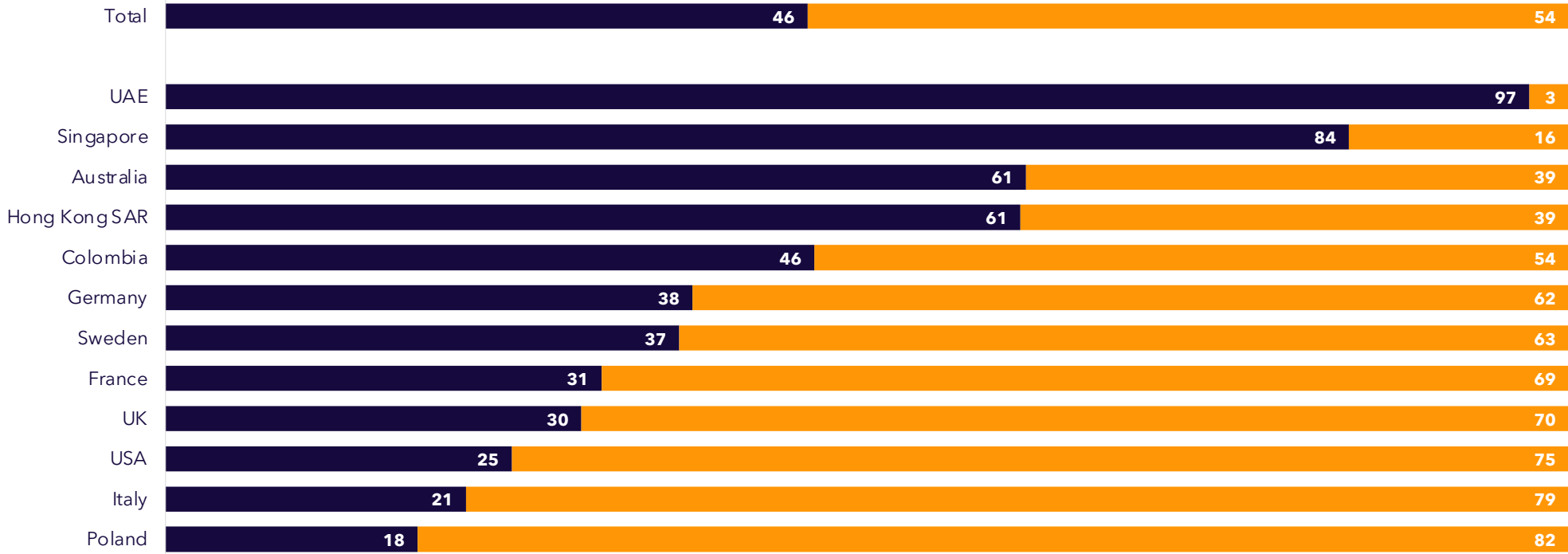
Initiatives to genuinely support the most vulnerable consumers should also be prioritised.



Perceived direction each country / territory is heading in.

Slightly less than half (46%) felt that things in their country / territory are heading in the right direction. There are large variations in results across the 12 countries and territories, with participants from the UAE, Singapore, Australia and the Hong Kong SAR generally feeling that things are heading in the right direction and participants from Europe, Colombia and the USA generally feeling that things are heading in the wrong direction.

Perceived direction country / territory is headed



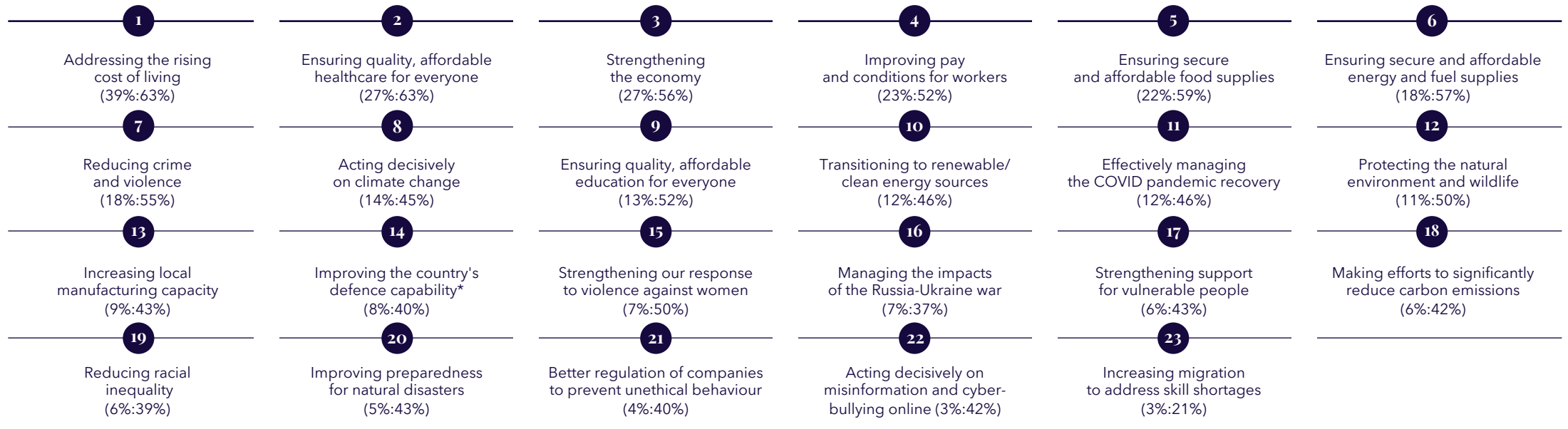
■ Right track (%) ■ Wrong direction (%)

Priority issues at the country / territory level.

Survey participants were shown a list of 23 priority issues and asked to rate how important each one was for their country's / territory's future (out of 10). They were then asked to select their top 3 priorities. The diagram below shows the 23 issues ranked in terms of the proportion who selected each in their top 3 (the first number in brackets, the second number was the proportion who gave it an importance rating of 9 or 10 – where 10 was 'extremely important').

The results show that the flow-on impacts of the COVID-19 pandemic and the Ukraine war are being felt across the globe, with people generally seeing the top priorities for their country's / territory's future as addressing the rising cost of living, ensuring quality, affordable healthcare and strengthening the economy.

Issues for the country's / territory's future ranked most to least important



LEGEND (X:X) = (% SELECTING AS A TOP-3 ISSUE : % WHO GAVE AN "EXTREMELY IMPORTANT" RATING OF 9 OR 10 OUT OF 10)

Base: All survey participants (n=11,059 - 12,063)

Q19. The following are things that some people believe are important for [INSERT COUNTRY'S] future. How important are these things to you personally? / Q20. From the following list, please select the three things you personally feel are most important for [COUNTRY'S] future. Rank them from 1 to 3 where 1 is the most important thing and 3 is the third most important thing.

[SAME LIST OF 23 ITEMS SHOWN IN Q19 AND Q20] * not asked in Hong Kong SAR

Top three priorities by country / territory.

Although the top priorities varied, addressing the rising cost of living topped the list for most of the countries and territories surveyed. Among those in Europe, ensuring a secure and affordable energy supply was also a high priority. For those in Colombia, France and Italy, improving pay and conditions for workers featured in the top three.

Top three priorities by country / territory

Australia



- 1. Addressing the rising cost of living (47%:63%)
- 2. Strengthening the economy (27%:50%)
- 3. Ensuring quality, affordable healthcare for everyone (25%:60%)

Colombia



- 1. Ensuring quality, affordable education for everyone (38%:82%)
- 2. Improving pay and conditions for workers (38%:81%)
- 3. Reducing crime and violence (33%:85%)

France



- 1. Addressing the rising cost of living (31%:49%)
- 2. Improving pay and conditions for workers (30%:44%)
- 3. Ensuring quality, affordable healthcare for everyone (28%:54%)

Germany



- 1. Addressing the rising cost of living (39%:63%)
- 2. Ensuring secure and affordable food supplies (32%:64%)
- 3. Ensuring secure and affordable energy and fuel supplies (28%:63%)

Hong Kong SAR



- 1. Addressing the rising cost of living (46%:50%)
- 2. Effectively managing the COVID pandemic recovery (38%:46%)
- 3. Strengthening the economy (37%:46%)

Italy



- 1. Improving pay and conditions for workers (37%:64%)
- 2. Ensuring quality, affordable healthcare for everyone (30%:70%)
- 3. Addressing the rising cost of living (30%:66%)

LEGEND (X:X) = (% SELECTING AS A TOP-3 ISSUE : % WHO GAVE AN "EXTREMELY IMPORTANT" RATING OF 9 OR 10 OUT OF 10)

Base: All survey participants (n=11,059 - 12,063)
 Q19. The following are things that some people believe are important for [INSERT COUNTRY'S] future. How important are these things to you personally?
 Q20. From the following list, please select the three things you personally feel are most important for [COUNTRY'S] future.
 Rank them from 1 to 3 where 1 is the most important thing and 3 is the third most important thing.
 Countries and territories are presented in alphabetical order.

Top three priorities by country / territory *cont'd.*

More than half of those in Singapore and the UK said addressing the rising cost of living is in their list of top three priorities for their country's future. Reducing crime and violence was a key concern in Colombia, Sweden and the USA.

Top three priorities by country / territory cont'd

Poland



- 1. Addressing the rising cost of living (41%:68%)
- 2. Strengthening the economy (33%:65%)
- 3. Ensuring secure and affordable energy and fuel supplies (32%:67%)

Singapore



- 1. Addressing the rising cost of living (54%:62%)
- 2. Ensuring quality, affordable healthcare for everyone (31%:60%)
- 3. Ensuring secure and affordable food supplies (31%:55%)

Sweden



- 1. Reducing crime and violence (45%:69%)
- 2. Ensuring quality, affordable healthcare for everyone (31%:66%)
- 3. Ensuring secure and affordable energy and fuel supplies (25%:58%)

United Arab Emirates (UAE)



- 1. Improving pay and conditions for workers (33%:71%)
- 2. Addressing the rising cost of living (33%:70%)
- 3. Ensuring quality, affordable healthcare for everyone (27%:73%)

United Kingdom (UK)



- 1. Addressing the rising cost of living (52%:70%)
- 2. Ensuring secure and affordable energy and fuel supplies (32%:66%)
- 3. Ensuring secure and affordable food supplies (29%:64%)

United States of America (USA)



- 1. Addressing the rising cost of living (42%:67%)
- 2. Strengthening the economy (36%:65%)
- 3. Reducing crime and violence (28%:59%)

LEGEND (X:X) = ("POLITICAL HEAT SCORE" - % SELECTING AS A TOP-3 ISSUE : % WHO GAVE AN "EXTREMELY IMPORTANT" RATING OF 9 OR 10 OUT OF 10)

Base: All survey participants (n=11,059 - 12,063)

Q19. The following are things that some people believe are important for [INSERT COUNTRY'S] future. How important are these things to you personally?

Q20. From the following list, please select the three things you personally feel are most important for [COUNTRY'S] future.

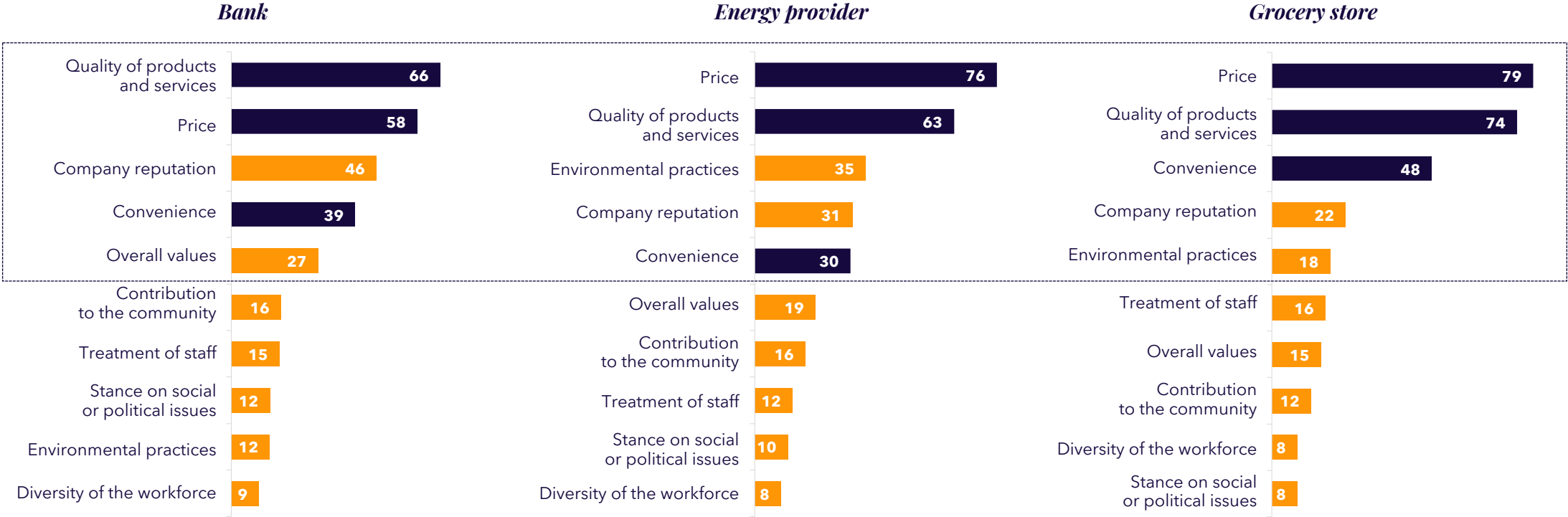
Rank them from 1 to 3 where 1 is the most important thing and 3 is the third most important thing.

Countries and territories are presented in alphabetical order.

Priorities when choosing a company to do business with.

When asked about the relative importance of different factors when choosing a company, price, quality and convenience are naturally high on the list. However, consumers also placed a high importance on company reputation and other core ESG factors such as environmental practices and overall values.

When choosing a bank, an energy provider, a grocery store / supermarket, how important are the following factors?



Orange bars represent core ESG factors. Purple bars represent other factors.

Base: All survey participants (n=12,063)

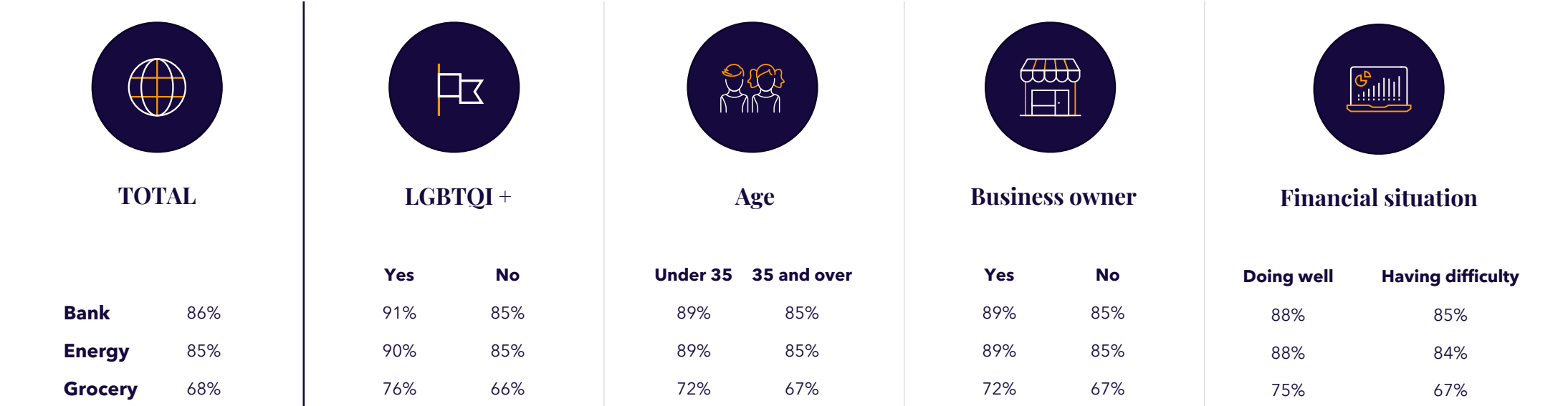
Q21. When choosing (i) a bank; (ii) an energy provider; (iii) a grocery store / supermarket, how important are the following factors? Please rank them from the most important to the least important factor.

The rankings show the % of participants who selected each factor in their top 3 most important factors when choosing a company.

Who prioritises core ESG issues when choosing a company to deal with?

When choosing a bank, energy provider or supermarket, survey participants who were consistently more likely to select core factors related to ESG in their top three priorities included those who identified as part of the LGBTQI+ community, those under the age of 35, business owners and those doing well financially.

Who prioritises core ESG issues?



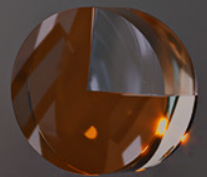
LEGEND: % SELECTING AT LEAST ONE CORE ESG FACTOR AS A TOP-3 ISSUE (IN GROUP % : OUT GROUP %)

Base: All survey participants (n=12,063)

Q21. When choosing (i) a bank; (ii) an energy provider; (iii) a grocery store / supermarket, how important are the following factors? Please rank them from the most important to the least important factor. The calculation is based on number of respondents who selected core factors related to ESG issues (e.g., environmental practices, treatment of staff and overall values) in their top 3 most important priorities when choosing a company.

SECTION 2

How much do we really care about ESG?



How much do we really care about ESG?

Overall, interest in ESG is more moderate this year, with a decline in interest across many countries and territories surveyed compared to 2021, as other more pressing matters of survival have come to the fore.

Interest in the individual ESG pillars – the E, the S and the G – was higher than interest in ESG overall.

Despite the environment being seen as the most important pillar for companies to focus on, awareness of the term ‘Net Zero’ was limited, with fewer than one in five participants (17%) claiming a good understanding of it.

Even though most survey participants think it’s important for companies to act on ESG issues (with an average rating of 7.6 out of 10), most also felt uninformed about companies’ ESG activities and performance, with only one in three at least sometimes searching for this information.

This reflects both limited awareness of ESG as well as an expectation often expressed in our qualitative research that it’s just up to companies to ‘do the right thing’.

So, what does this mean for companies around the word?

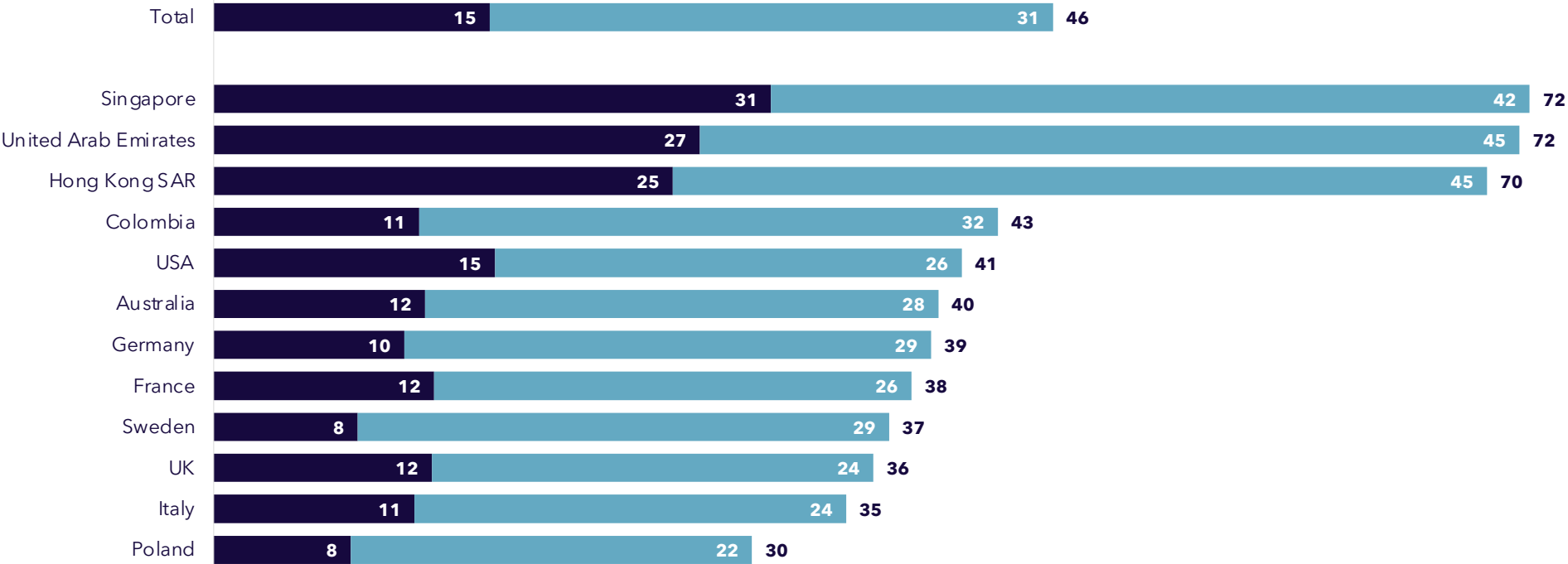
Although consumers want transparency around ESG performance, most are not actively looking for this information – yet! Companies should anticipate more attention in this domain over time, and strive to communicate such information in clear and attention-grabbing ways, using a range of different channels.

Companies need to be mindful of the limited awareness of ‘Net Zero’ when communicating about their environmental efforts, taking care to ensure this still relatively technical term is clearly explained in the context of those activities.

Awareness and knowledge of the term 'ESG'.

Overall, unprompted awareness of the term ESG was limited, with fewer than one in six participants (15%) claiming a good understanding of it. Three in ten (31%) thought they had heard of ESG but weren't sure what it is, while nearly half (46%) had never heard of it. Despite the limited awareness, further questions show that the community do understand the concept once it is explained.

Unprompted awareness of ESG by country / territory (%)

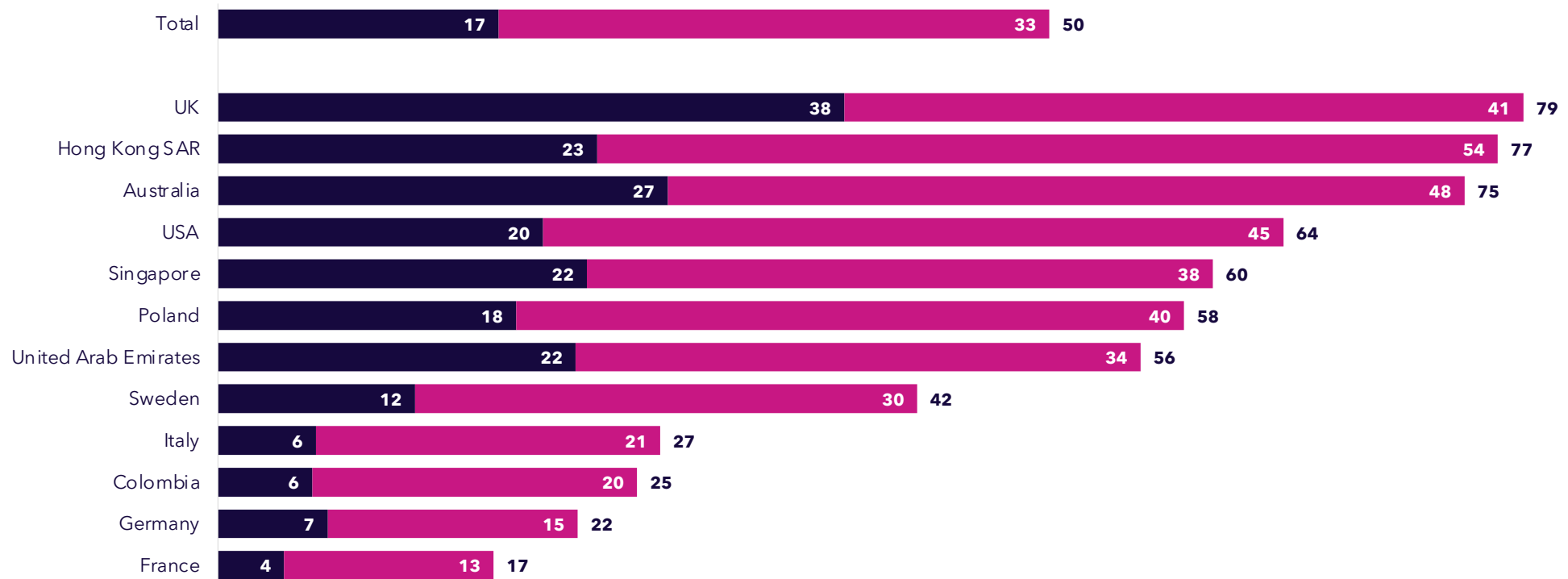


Heard of ESG - have a good understanding of it
 Heard of ESG - not sure what it is
 TOTAL heard of ESG

Awareness and knowledge of 'Net Zero'.

As with the term 'ESG,' unprompted awareness of 'Net Zero' was also limited with fewer than one in five participants (17%) saying they had a good understanding of it. A third (33%) said they had heard the term but were not sure what it is and half (50%) had never heard of it. Those in Europe were least likely to say they had heard of it.

Unprompted awareness of NET Zero by country / territory (%)



■ Heard of Net Zero - have a good understanding of it

■ Heard of Net Zero - not sure what it is

TOTAL heard of Net Zero

What is ESG?

After asking participants whether they had heard of the term ESG without explaining what it is, they were shown the text below. When we explained what ESG stands for, it was clear that survey participants readily understood it. We also explored the issue of what to call action in this area in focus groups conducted earlier this year and participants said they liked use of 'ESG' as a potential framework for companies to use to hold themselves to account for action in these key areas.

*As you may already know, the term “ESG” refers to standards, policies and behaviours that organisations have in relation to **Environmental, Social and Governance** issues.*

Some examples of these issues include:



Environmental

Action on climate change, use of natural resources, waste management, pollution, toxin free environments and the preservation of habitats and living creatures.



Social

Human rights, working conditions, health and safety, social equality, diversity and inclusion, contributing to the local community, speaking out on social or political issues.



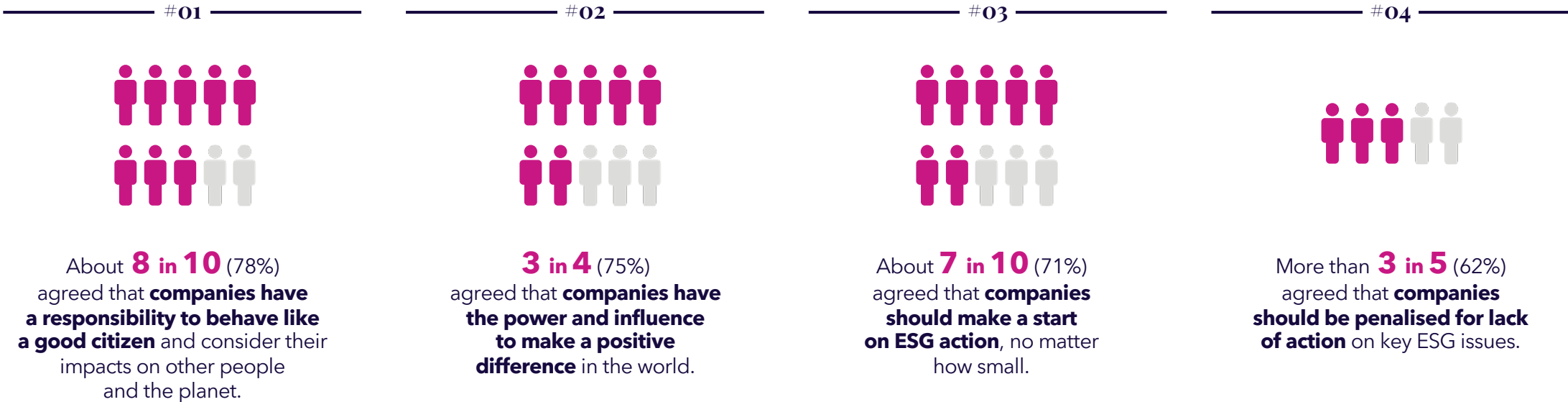
Governance

Ethical standards, transparent reporting, responsible policies and procedures, board diversity, data protection and privacy, risk management etc.



Community expectations around ESG action.

The community expects companies **to take action on ESG** - even if it's not the most important issue for them currently.



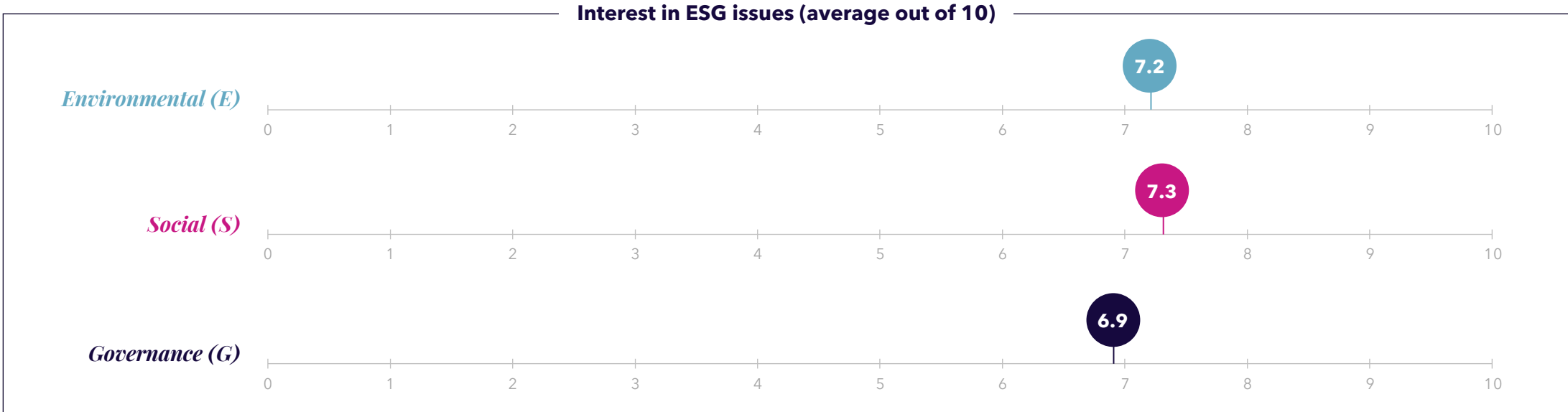
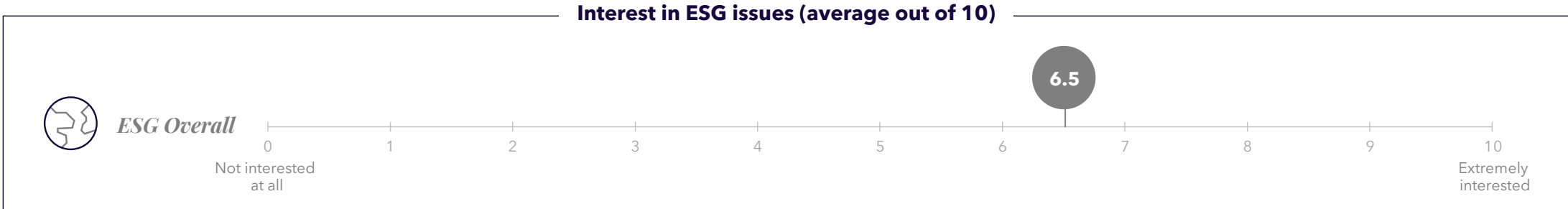
but



Nearly **half** (46%) agreed that there are **bigger issues than ESG to worry about** in this world right now.

Global interest in ESG.

After being shown an explanation of what ESG is, overall interest was moderate, with participants giving an average interest rating of 6.5 out of 10. Interest in individual ESG pillars was higher, with social issues particularly salient (average rating of 7.3 out of 10), followed closely by environmental issues (7.2 out of 10) and then governance issues (6.9 out of 10).



Base: All survey participants (n=12,063)

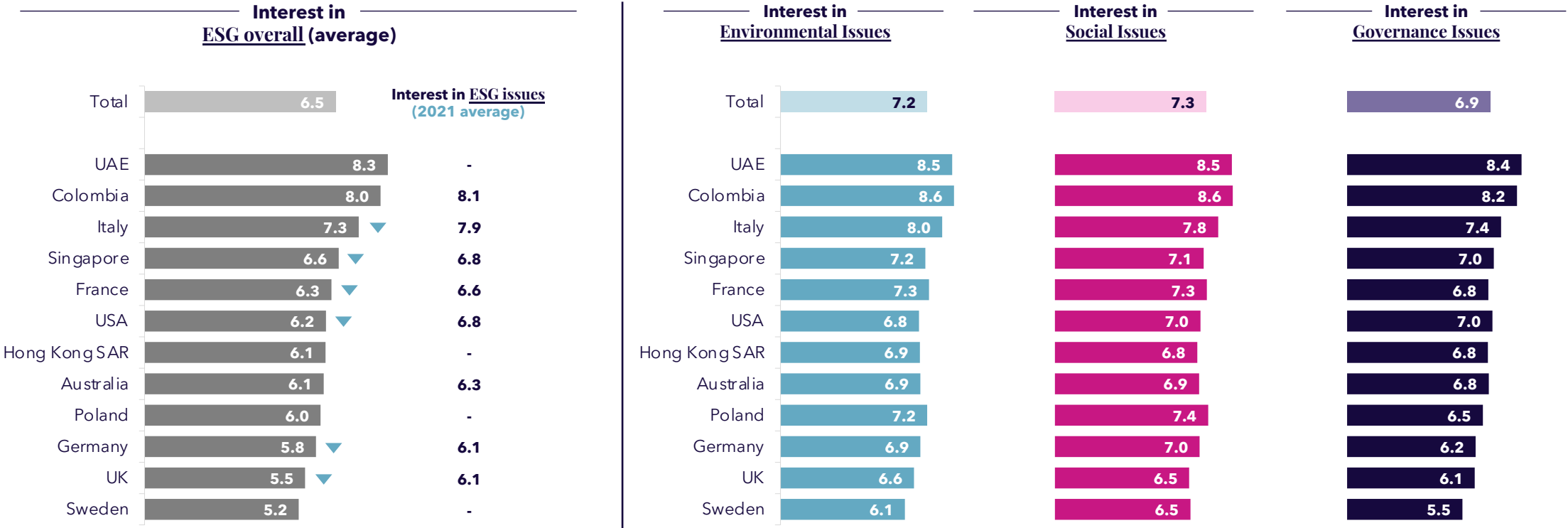
Q4. How interested are you in Environmental, Social and Governance (ESG) issues, if at all?

Q22. And how interested are you in following aspects of ESG, if at all?

Scale: 0=not at all interested, 10=extremely interested

Interest in ESG by country / territory.

There has been a decline in interest in ESG across many of the countries surveyed, suggesting that people are focused on more pressing concerns right now. Across all three pillars, ESG issues were of most interest in the United Arab Emirates (overall average interest rating of 8.3 out of 10), Colombia (8.0) and Italy (7.3). Across most countries and territories, participants were more interested in environmental and social issues than governance issues.

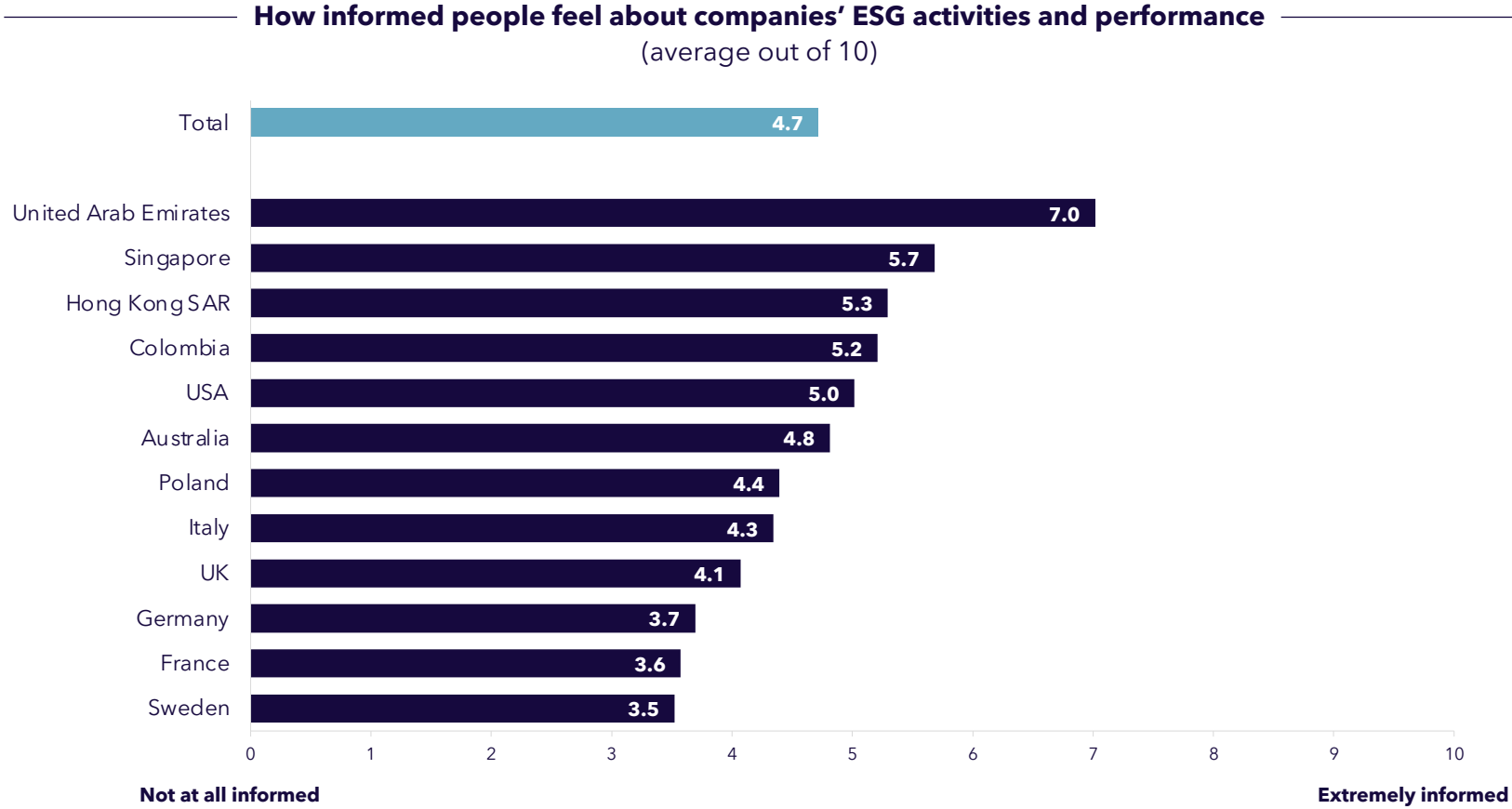


▲ ▼ Significantly higher / lower than previous year.

Base: All survey participants (2022: n=12,063, 2021: n=10,203)
 Q4. How interested are you in Environmental, Social and Governance (ESG) issues, if at all?
 Q22. And how interested are you in following aspects of ESG, if at all?
 Scale: 0=not at all interested, 10=extremely interested

How informed do people feel about ESG?

Community knowledge about companies' ESG activities and performance was limited, with participants reporting lower than average feelings of being informed, at **4.7 out of 10 on average**. Respondents from the UAE (7.0 out of 10), Singapore (5.7 out of 10) and the Hong Kong SAR (5.3 out of 10) felt the most informed, while those in Europe felt the least informed.



Many local companies often do not have any ESG standards. It is a black hole of information. Most of these companies are not transparent about how their products are sourced or manufactured, or how they treat their workers. It is mostly the very large companies and foreign companies that we can track. The issue is that local companies are the ones that consumers probably have to deal with the most in our daily lives and so we cannot make good decisions.

(Singaporean survey participant)



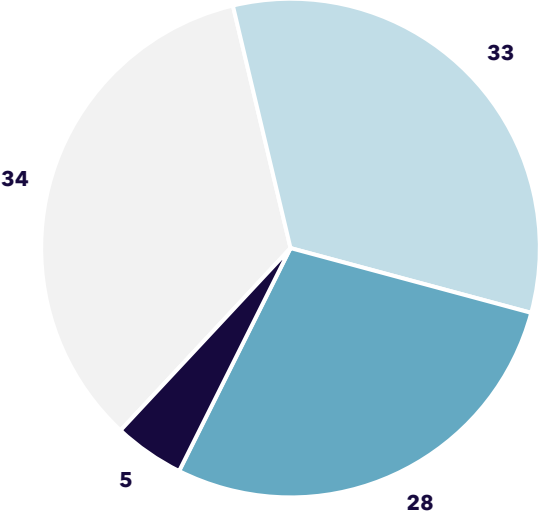
I think the most important thing is transparency in reporting. If there is transparency, then society will see what companies are doing to improve ESG issues.

(Australian survey participant)

Information seeking on company ESG performance.

Only about a third of participants (33%) claimed to actively research company ESG activities or performance at least sometimes, with just 5% doing so 'often'. The other third (33%) rarely look for this information and a further third (34%) never do so. Those who identify as part of the LGBTQI + community, business owners and university educated individuals were more likely to seek information on company ESG performance.

Frequency of looking for information on companies' ESG activities and performance (%)



Those more likely to seek information on company ESG performance:

(NET SOMETIMES + OFTEN %)

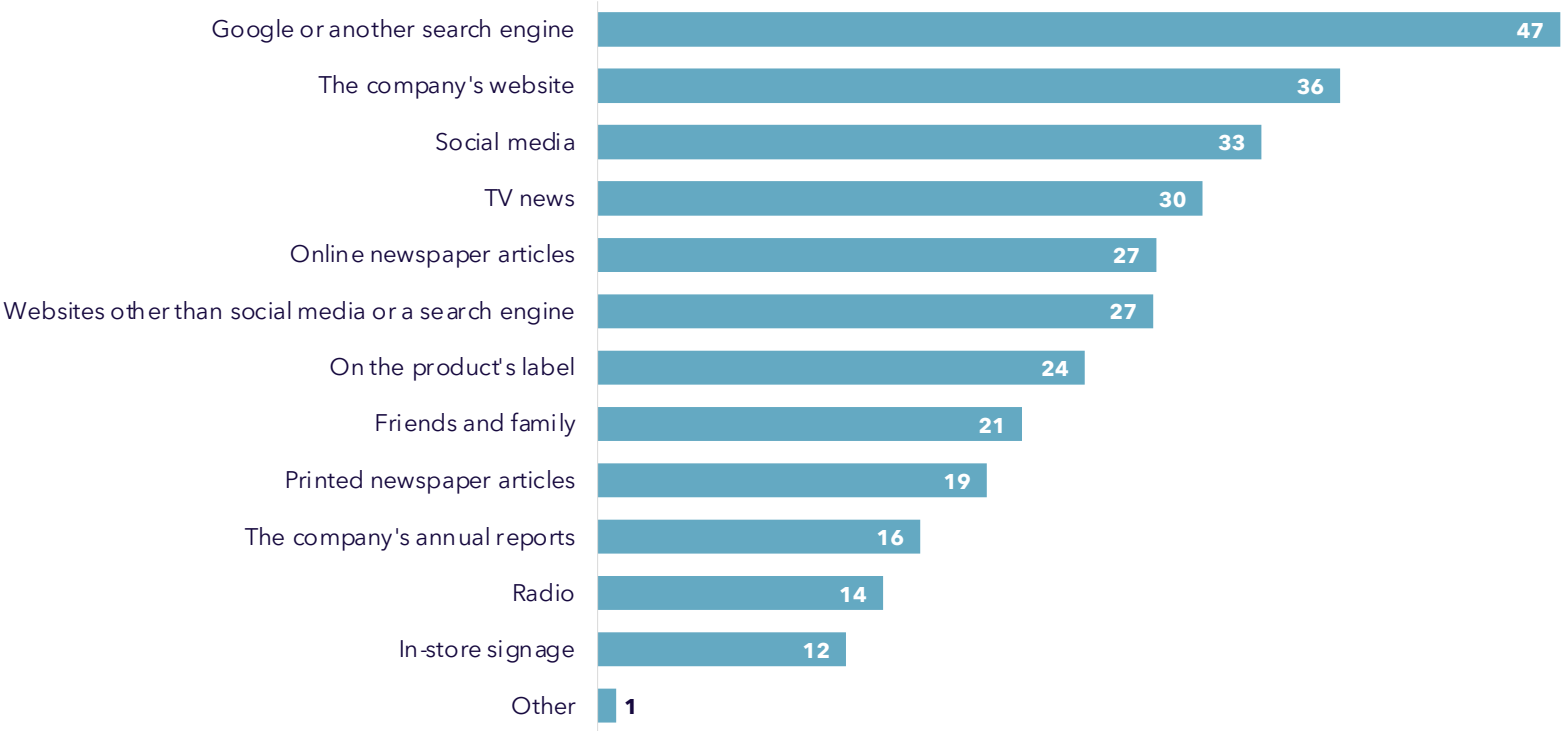
- LGBTQI + (52%)
- Business owners (51%)
- University educated individuals (43%)
- Under 35 years old (42%)
- Employed people (39%)

Never Rarely Sometimes Often

Sources of information on company ESG performance.

Search engines, company websites and social media were the top sources of information regarding companies' ESG activities and performance. Despite google and company websites being the most commonly used information channel among all age groups, those aged under 35 were particularly more likely to look for information online, while older age groups (those over 65) were more likely to also look for information offline.

Sources of information on companies' ESG activities and performance
(% among those who do look for information)

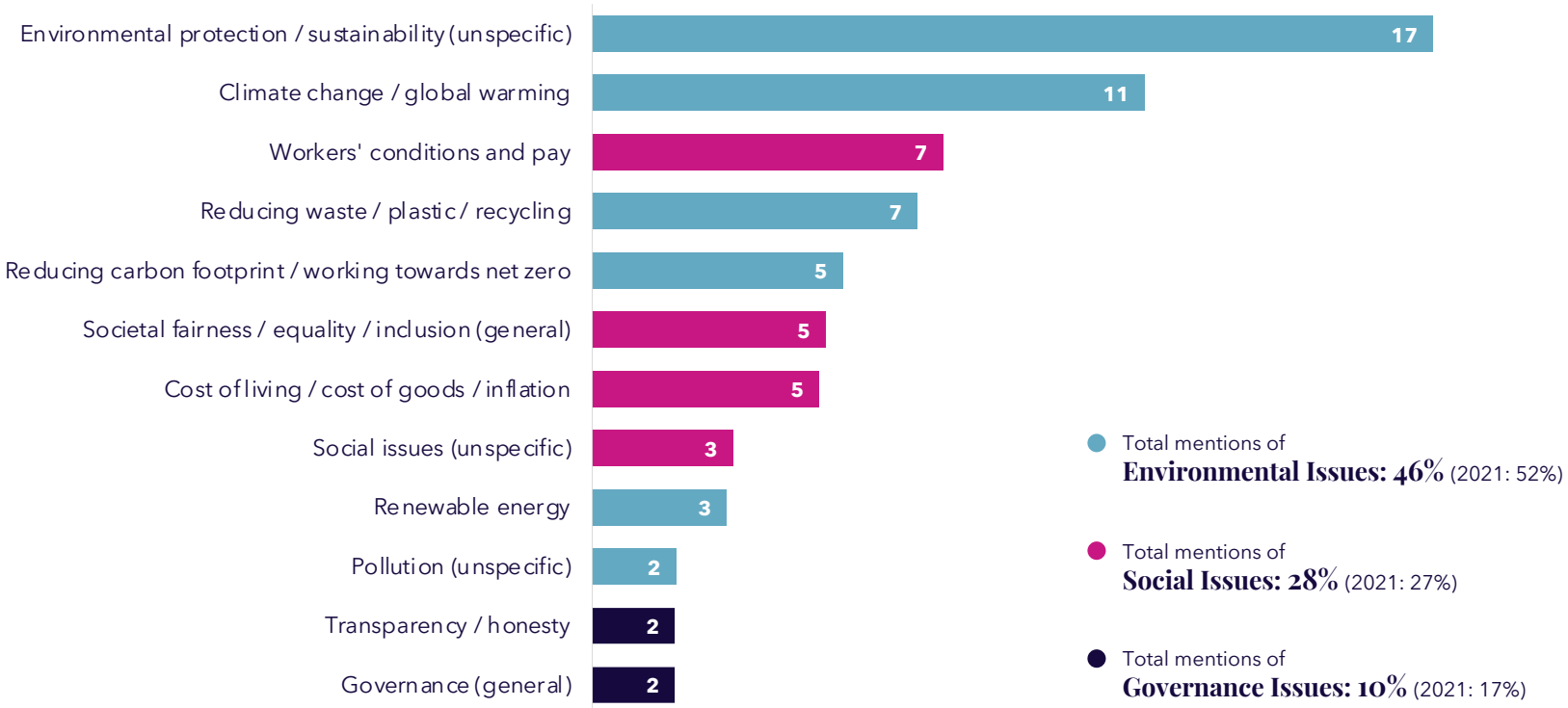


Base: Those who rarely, sometimes or often look for information (n=7,919)
Q27. Where do you go for information about a company's activities or ESG performance?

Top ESG issues (unprompted).

When asked an open-response question about the one ESG issue they feel is most important for companies in their country / territory to focus on, protecting the environment was the clear front-runner, mentioned by 17% of participants. This was followed by climate change (11%) and workers conditions and pay (7%). In total, environmental issues were cited by nearly half (46%).

Most important ESG issue for companies to be focussing on - coded (%)



Base: All survey participants (n=12,063).

Q5. What is the one Environmental, Social or Governance issue that you think is most important for companies in [insert country] to be focusing on?
 Note that this was an open-response question that was coded into key themes. Multiple responses allowed. Coded responses <2% not shown.
 Coding excludes 'Don't know' and 'N/A' responses.(19%)

Top three priorities by country / territory.

Across all 12 countries and territories, **issues related to the environment** featured in the top three ESG issues that people raised unprompted.

Top three priorities by country / territory

Australia

1. Climate change / global warming (18%)
2. Environmental protection / sustainability (12%)
3. Reducing waste / plastic / recycling (9%)



Colombia

1. Environmental protection / sustainability (38%)
2. Climate change / global warming (9%)
3. Reducing waste / plastic / recycling (8%)



France

1. Climate change / global warming (16%)
2. Environmental protection / sustainability (9%)
3. Workers' conditions and pay (7%)



Germany

1. Climate change / global warming (16%)
2. Environmental protection / sustainability (15%)
3. Workers' conditions and pay (7%)



Hong Kong SAR

1. Environmental protection / sustainability (13%)
2. Societal fairness / equality / inclusion (6%)
3. Reducing waste / plastic / recycling (5%)



Italy

1. Environmental protection / sustainability (19%)
2. Climate change / global warming (15%)
3. Workers' conditions and pay (15%)



% SELECTING AS A TOP-3 ISSUE

Top three priorities by country / territory *cont'd.*

In addition to environmental issues, **workers' conditions and pay** appeared as a top three issue in several countries including Italy, Poland, the UAE and the USA.

Top three priorities by country / territory cont'd

Poland

1. Environmental protection / sustainability (34%)
2. Workers' conditions and pay (10%)
3. Social issues (unspecific) (6%)



Singapore

1. Climate change / global warming (16%)
2. Environmental protection / sustainability (14%)
3. Reducing waste / plastic / recycling (12%)



Sweden

1. Environmental protection / sustainability (18%)
2. Climate change / global warming (9%)
3. Reducing carbon footprint / working towards net zero (6%)



United Arab Emirates (UAE)

1. Environmental protection / sustainability (15%)
2. Climate change / global warming (12%)
3. Workers' conditions and pay (12%)



United Kingdom (UK)

1. Environmental protection / sustainability (13%)
2. Climate change / global warming (12%)
3. Reducing waste / plastic / recycling (10%)



United States of America (USA)

1. Climate change / global warming (13%)
2. Environmental protection / sustainability (9%)
3. Workers' conditions and pay (8%)



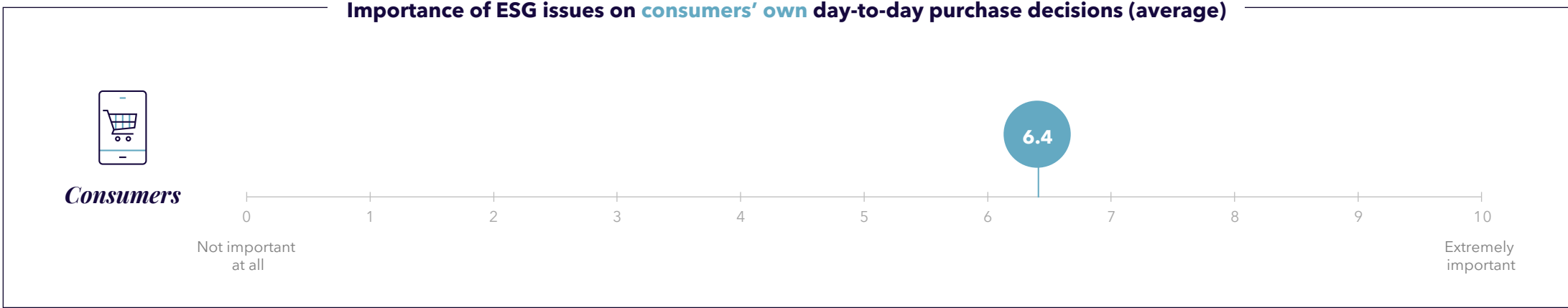
% SELECTING AS A TOP-3 ISSUE

Base: All survey participants (n=12,063)

Q5. What is the one Environmental, Social or Governance issue that you think is most important for companies in [insert country] to be focusing on?
 Note that this was an open-response question that was coded into key themes. Multiple responses allowed.

Importance of acting on ESG issues.

People think it's more important for companies to **act on ESG issues** than it is for them to personally do so in their day-to-day purchase decisions.



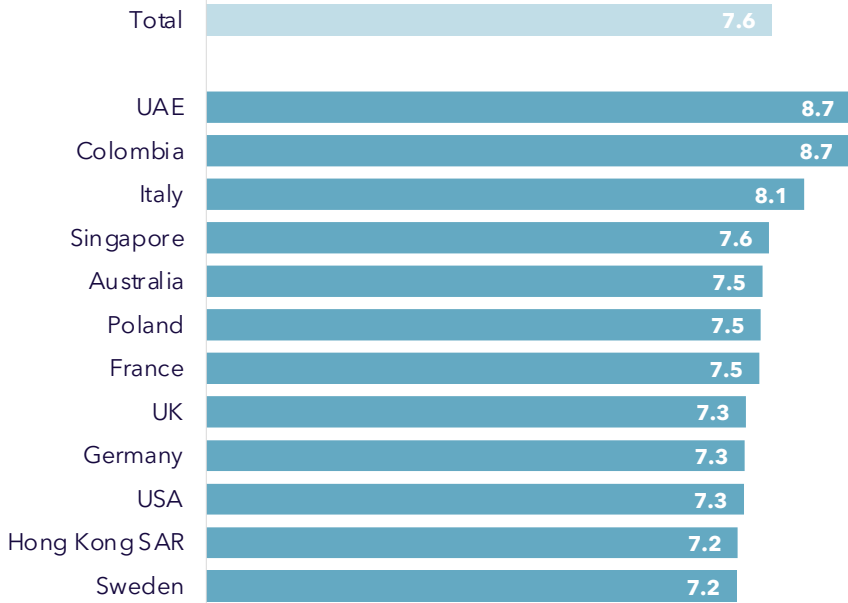
Base: All survey participants (n=12,063)

Q23. How important do you think it is for companies to take action on environmental, social and governance issues?
Q10. And in your day-to-day life, how important are ESG issues in influencing whether you decide to purchase products or services from specific companies? Scale: 0=not at all important, 10=extremely important

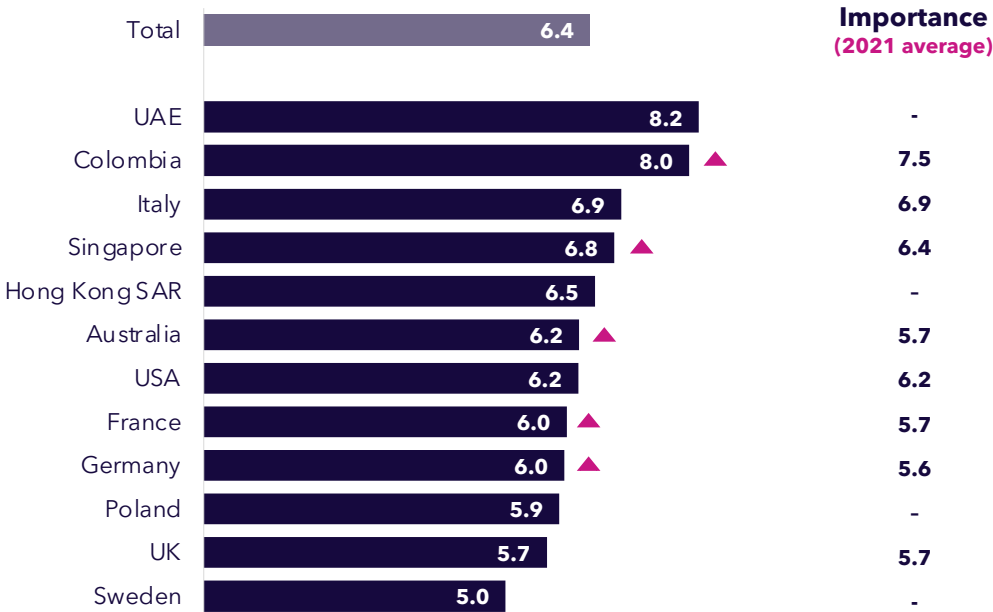
Importance of acting on ESG issues by country / territory.

In line with higher levels of interest in ESG issues, participants from the UAE, Colombia and Italy placed the highest levels of importance on **companies taking action on ESG issues and on ESG influencing their own day-to-day purchase decisions**. Notably, importance of ESG issues on individual purchase decisions have increased among many of the countries surveyed in 2021.

Importance of companies taking action on ESG issues (average)



Importance of ESG issues on consumers' own day-to-day purchase decisions (average)



▲ ▼ Significantly higher / lower than previous year.

Base: All survey participants (2022: n=12,063, 2021: n=10,174)
 Q23. How important do you think it is for companies to take action on environmental, social and governance issues? /
 Q10. And in your day-to-day life, how important are ESG issues in influencing whether you decide to purchase products or services from specific companies? Scale: 0=not at all important, 10=extremely important

Who is more likely to expect action on ESG?

Those more likely to expect action on ESG issues included: women, younger people, university educated individuals, those engaged with politics and current affairs, working people and those who identify as part of the LGBTQI+ community.

Those more likely to place importance on companies taking action on ESG issues...



Women
(7.8 vs 7.5 for men)



Younger people
(7.7 for under 50s vs 7.5 for over 50s)



University educated
(7.9 vs 7.5 for those not university educated)



Politically engaged
(7.9 vs 7.2 for those not following politics and current affairs)



LGBTQI+
(8.2 vs 7.6 for those not LGBTQI+)

Those more likely to consider ESG issues as important in their own individual purchase decisions...



Women
(6.6 vs 6.3 for men)



Younger people
(6.7 for under 50s vs 6.1 for over 50s)



University educated
(6.8 vs 6.2 for those not university educated)



Working
(6.7 vs 6.1 for those not working)



LGBTQI+
(7.3 vs 6.4 for those not LGBTQI+)

Base: All survey participants (n=12,063)

Q23. How important do you think it is for companies to take action on environmental, social and governance issues?

Q10. And in your day-to-day life, how important are ESG issues in influencing whether you decide to purchase products or services from specific companies?

The significance testing compared the average out of 10 for those in a segment compared to those not in that segment.

SECTION 3

How are we performing on ESG?

How are we performing on ESG?

ESG performance for a range of groups and sectors across the globe continues to be lacklustre overall, with ratings mostly between 5 and 6 out of 10.

Governments continue to trail behind the business sector in perceived action on ESG issues. The not-for-profit sector and small companies are perceived as doing better than large companies in many markets.

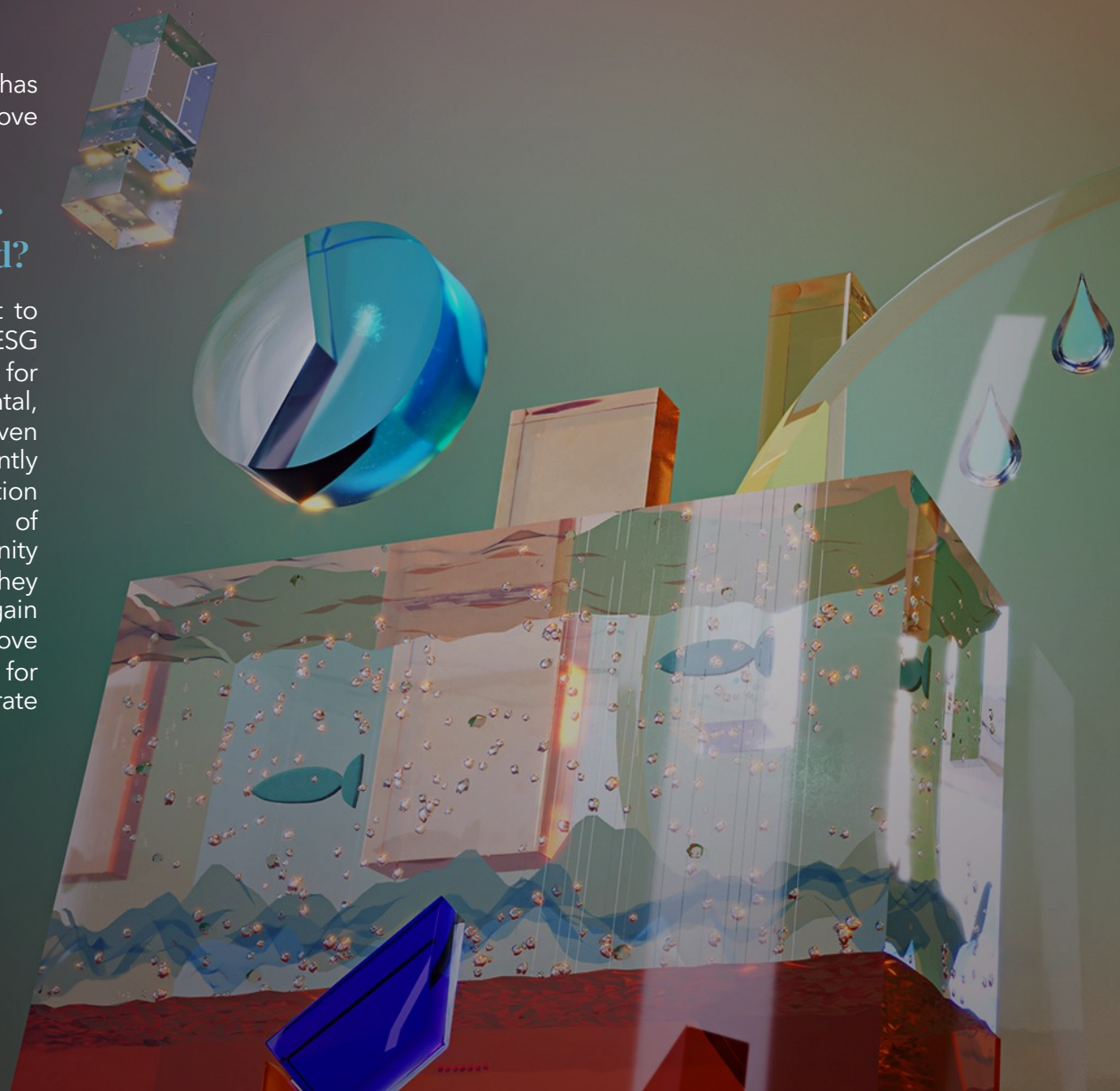
Specific company sectors seen to be acting most responsibly are healthcare, supermarkets and education. At the other end of the spectrum, the chemical and mining industries are seen to be performing the worst.

Environmental related actions are the biggest drivers of perceptions of company performance on ESG - whether they are large or small.

This is where concerted action has the greatest potential to either improve or damage a company's reputation.

So, what does this mean for companies around the world?

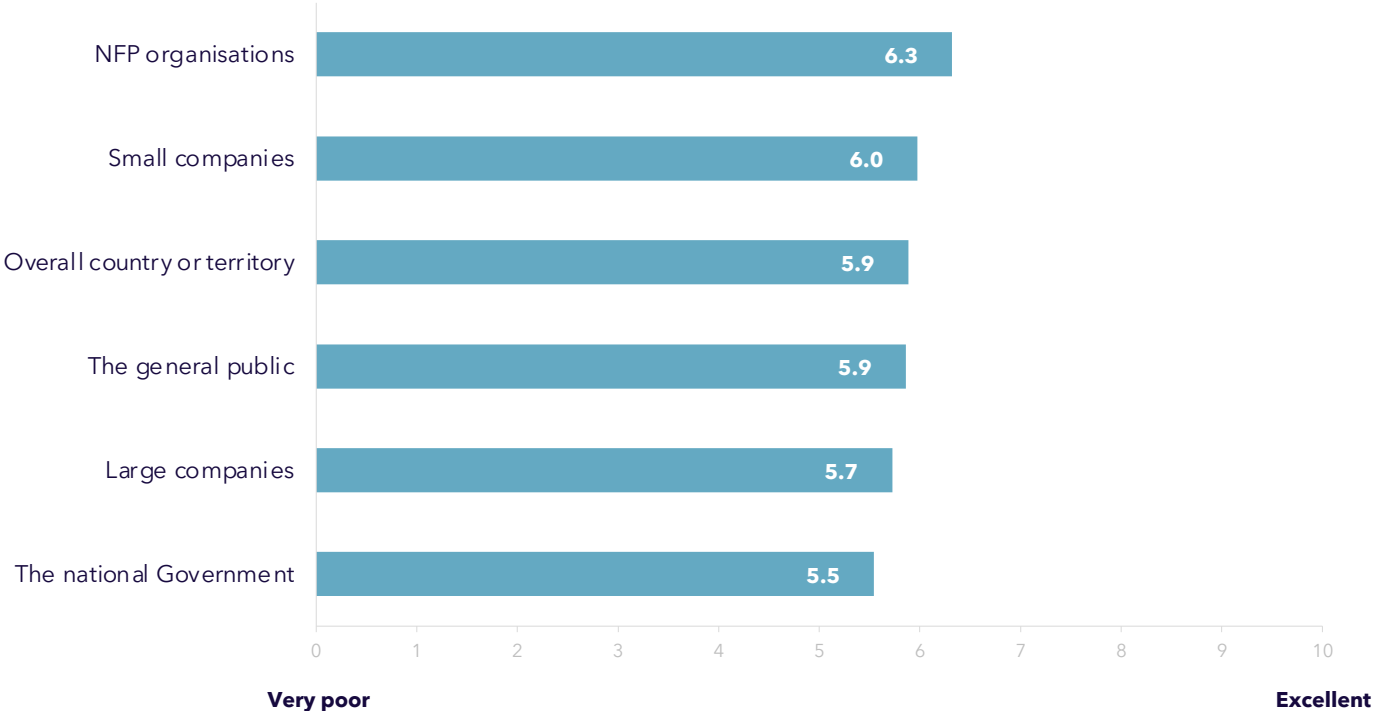
Much work lies ahead in the quest to improve perceptions of company ESG performance, both overall and for specific aspects of environmental, social and governance issues. Given most consumers are not currently actively looking for this information coupled with a perceived lack of information, there is a clear opportunity for companies to promote what they are doing in this space and gain leadership status in helping to improve overall perceptions not just for themselves but also the corporate sector more broadly.



Ratings of ESG performance by group.

Looking across the countries and territories surveyed, **not for profit organisations were rated highest for ESG performance**, ahead of small companies and the country or territory overall. The national Government was rated the lowest globally.

Performance of the following groups when it comes to ESG issues (average out of 10)



Top performing countries / territories:

(RATING OF 7+ FOR THE COUNTRY / TERRITORY OVERALL)

- **United Arab Emirates** (86%)
- **Singapore** (59%)
- **Australia** (46%)

Bottom performing countries / territories:

(RATING < 5 FOR THE COUNTRY / TERRITORY OVERALL)

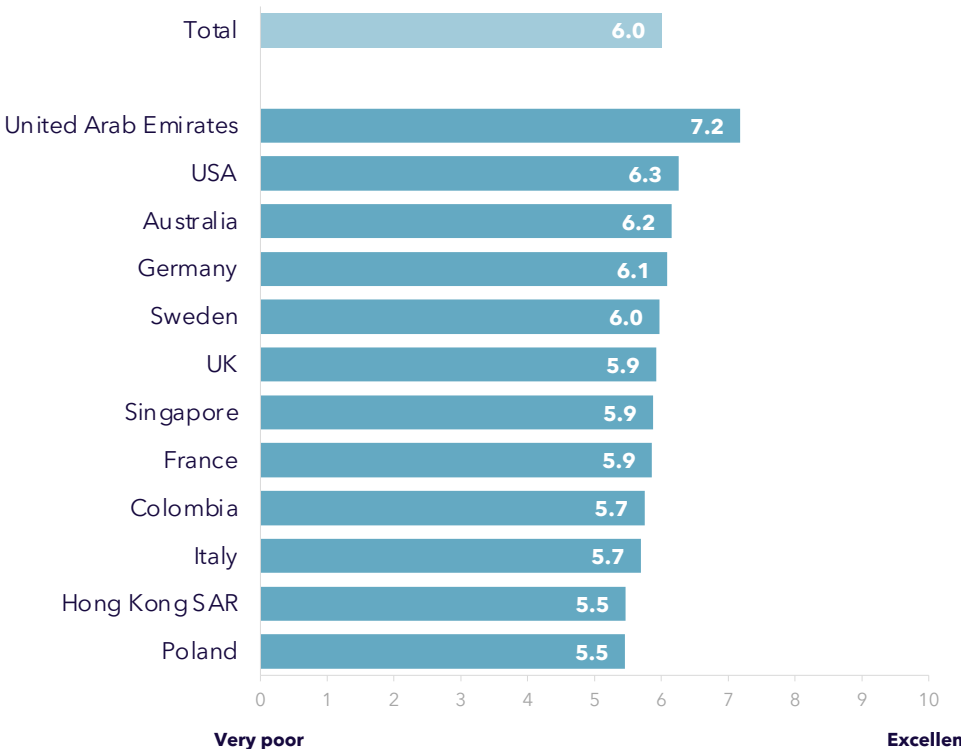
- **Hong Kong SAR** (32%)
- **Poland** (32%)
- **Colombia** (30%)

Base: All survey participants (n = 11,000 - 11,381) Average ratings exclude "don't know" responses.
 Q6. Overall, how would you rate the performance of the following groups when it comes to acting responsibly on Environmental, Social and Governance (ESG) issues? From a scale of 0 (very poor) to 10 (excellent).

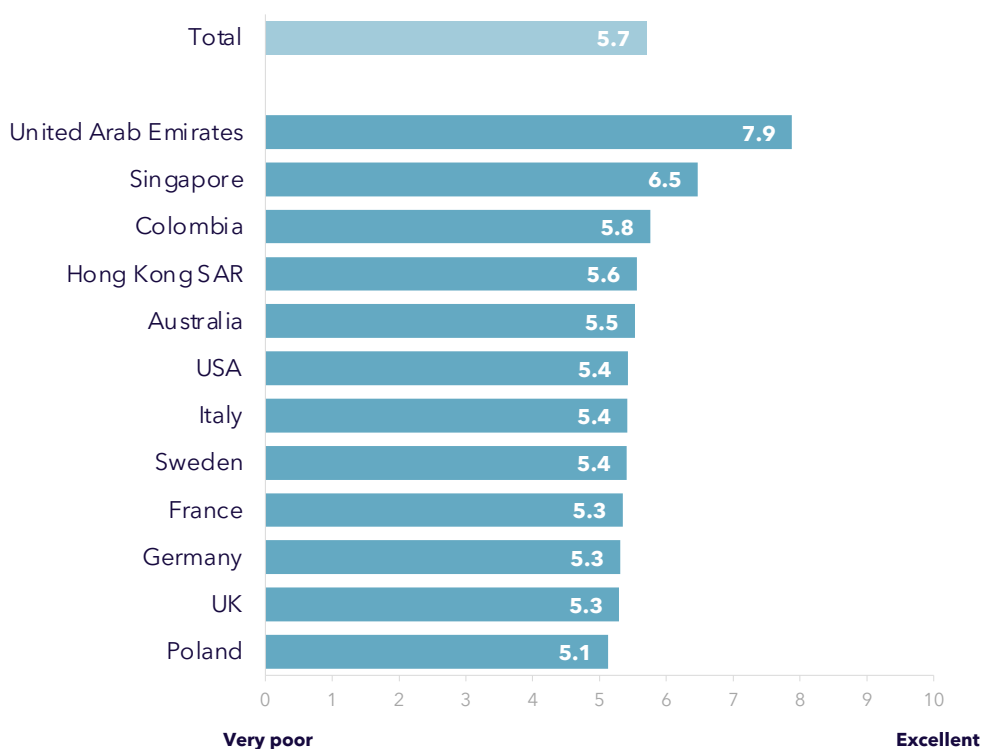
Ratings of company ESG performance.

When it came to the ESG performance of companies, participants from the United Arab Emirates gave the highest ratings for both small and large companies. Interestingly, countries like the UAE and Singapore gave higher ratings for large companies than they did smaller companies. By contrast, those in the USA, Australia, Germany, Sweden and the UK gave much higher ratings to smaller companies over larger companies.

Small company ESG performance by country / territory (average out of 10)



Large company ESG performance by country / territory (average out of 10)



Base: All survey participants (n = 11,000 – 11,381) Average ratings exclude “don’t know” responses.
 Q6. Overall, how would you rate the performance of the following groups when it comes to acting responsibly on Environmental, Social and Governance (ESG) issues? From a scale of 0 (very poor) to 10 (excellent).

How are specific industries performing on ESG?

When it comes to specific industry ESG performance, **the healthcare, supermarkets and education / training industries rated highest**, followed closely by technology and telecommunications, agriculture and hospitality. The chemical and mining industries scored the lowest overall.

**Ratings of industry ESG performance
(average out of 10)**

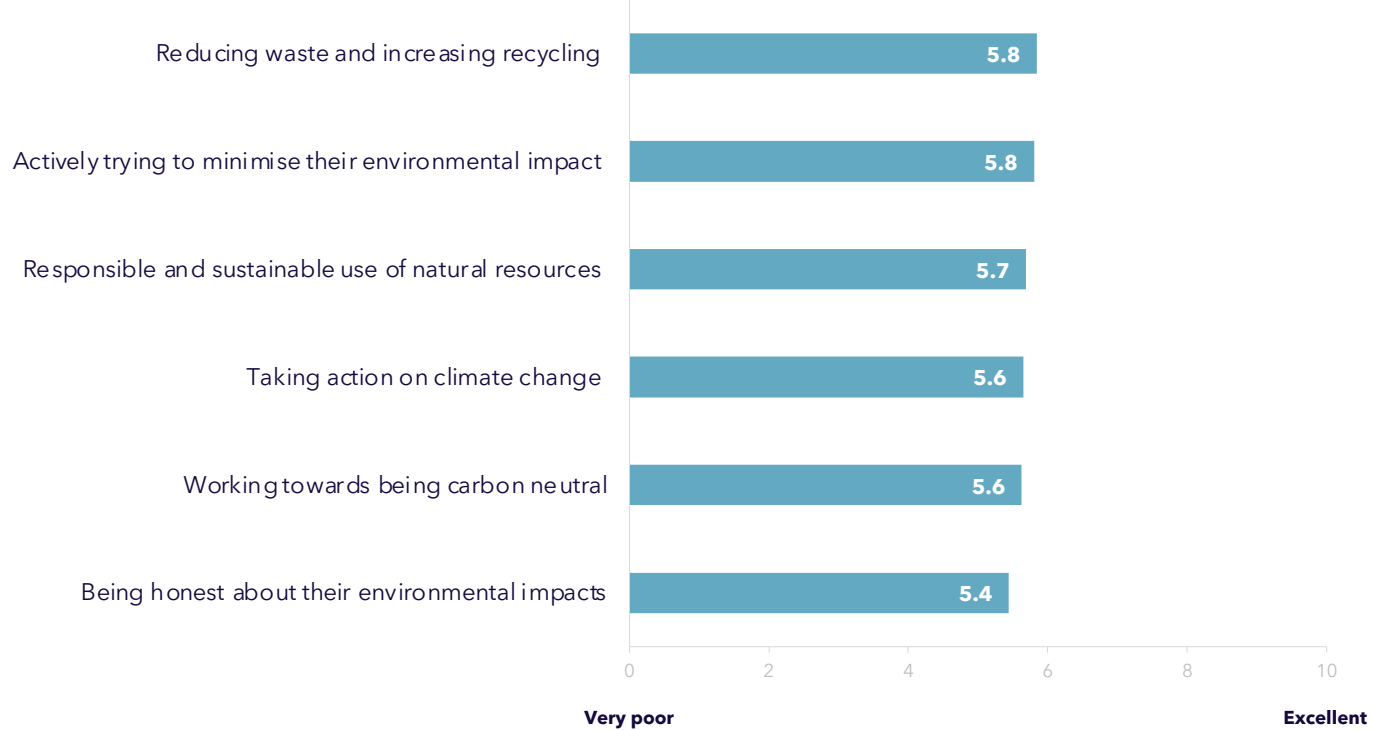


Base: All survey participants (n=10,050 - 11,381) Average ratings exclude "don't know" responses.
 Q11. How would you rate the performance of the following industries operating in [COUNTRY] when it comes to acting responsibly on Environmental, Social and Governance (ESG) issues? From a scale of 0 (very poor) to 10 (excellent).

Company performance on specific environmental aspects.

Reducing waste and increasing recycling (5.8) and actively trying to minimise environmental impacts (5.8) scored highest, followed closely by the responsible / sustainable use of natural resources (5.7). There was some scepticism about companies being honest in their reporting of environmental impacts (lowest rating of 5.4 out of 10).

Global ratings of company performance on **environmental** aspects (average out of 10)



The United Arab Emirates were more likely to rate the performance of their companies highly across all environmental aspects



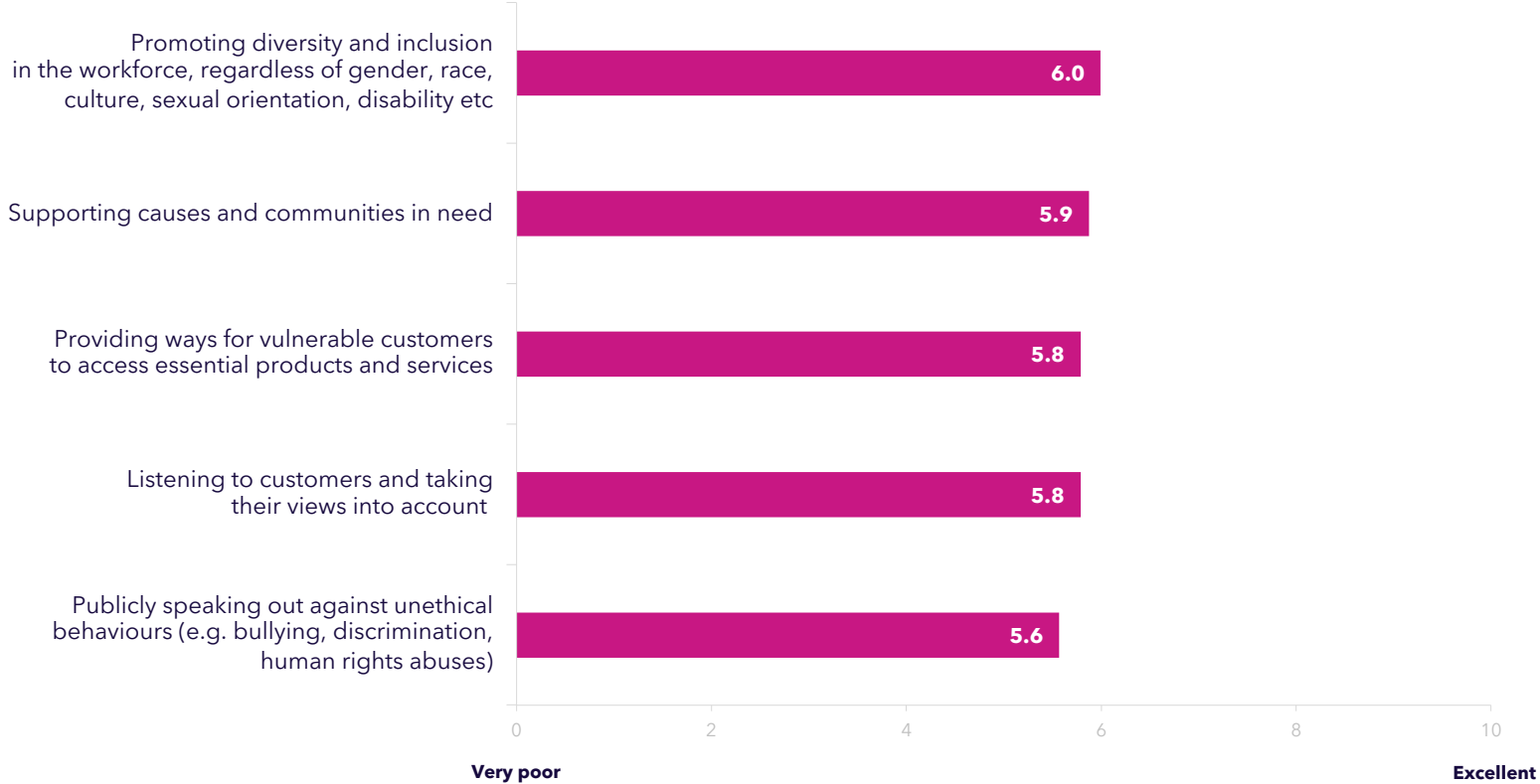
Singapore (6.3) and Australia (6.0) were more likely to rate the performance of companies highly when considering waste reduction and recycling

Base: All survey participants (n = 11,235 - 11,478) Average ratings exclude "don't know" responses.
 Q13. In general, how would you rate the performance of companies in [COUNTRY] on the following things? You could think of this like giving them a score out of 10. From a scale of 0 (very poor) to 10 (excellent).

Company performance on specific social aspects.

Ratings of company performance on social aspects also received fairly average ratings between 5 and 6 out of 10. Promoting diversity and inclusion in the workforce was rated highest (6.0), closely followed by supporting causes and communities in need (5.9).

Global ratings of company performance on **social** aspects (average out of 10)



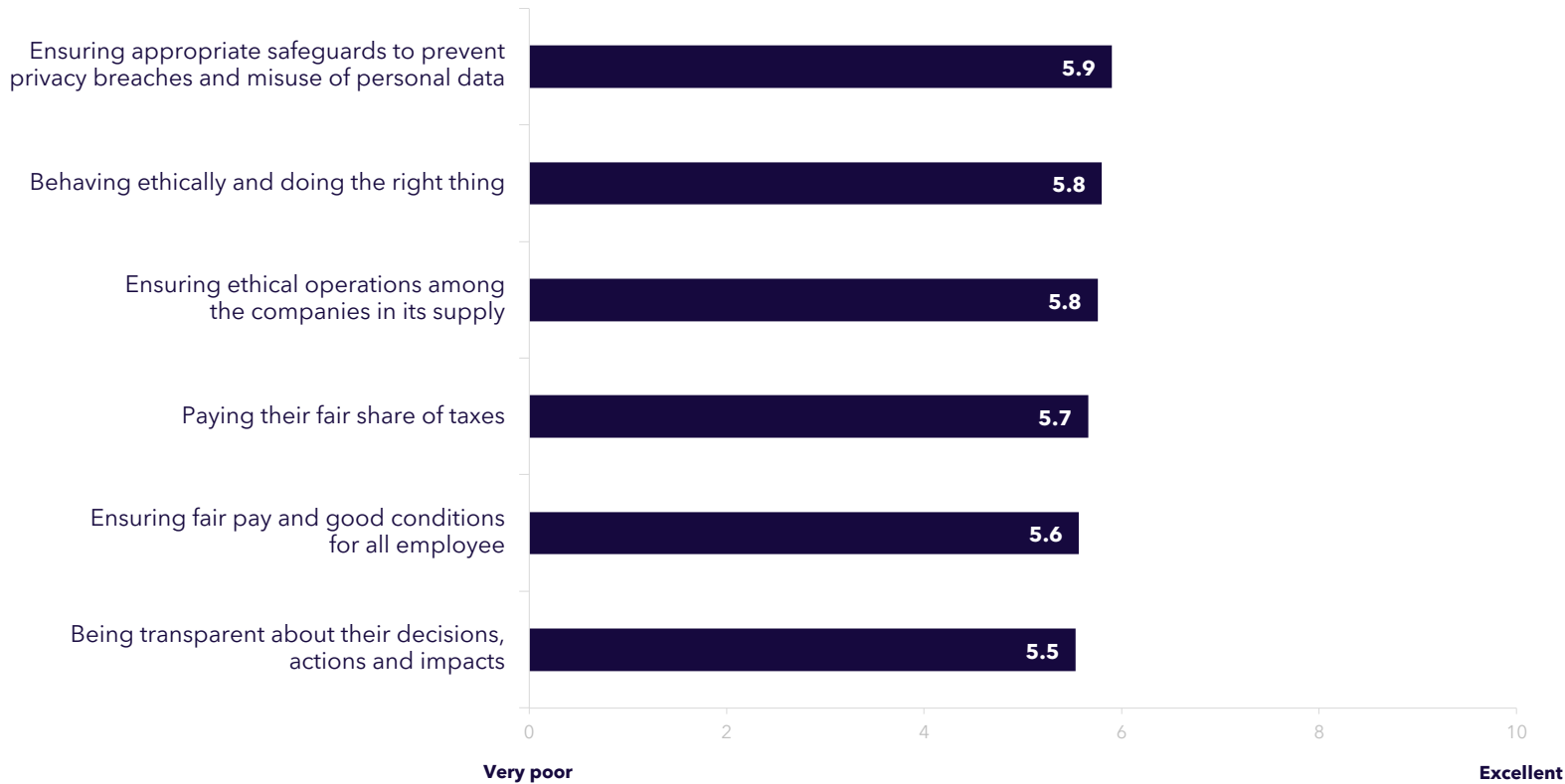
Australia scored above average in promoting diversity and inclusion in the workforce (6.3) as well as supporting causes and communities in need (6.2)

Base: All survey participants (n = 11,140 - 11,485) Average ratings exclude "don't know" responses.
Q13. In general, how would you rate the performance of companies in [COUNTRY] on the following things? You could think of this like giving them a score out of 10. From a scale of 0 (very poor) to 10 (excellent).

Company performance on specific governance aspects.

Safeguards to prevent privacy breaches, behaving ethically and ensuring ethical operations among the companies in its supply were areas where companies were rated highest when it came to specific governance aspects.

Global ratings of company performance on governance aspects (average out of 10)



Hong Kong SAR (6.0) was more likely to rate the performance of companies highly when it comes to paying their fair share of taxes.

Base: All survey participants (n = 10,985 - 11,353) Average ratings exclude "don't know" responses.
 Q13. In general, how would you rate the performance of companies in [COUNTRY] on the following things? You could think of this like giving them a score out of 10. From a scale of 0 (very poor) to 10 (excellent).

Top 5 factors driving ESG ratings of large vs small companies.

Driver analysis was conducted to understand how much specific ESG metrics influence overall ratings of small and large companies. For both large and small companies, key drivers of ESG performance mostly center around the environment. Small company performance ratings are most strongly driven by:

‘actively trying to minimise environmental impact’ and ‘supporting causes and communities in need’. For large companies, key areas to focus on include: ‘responsible and sustainable use of natural resources’ and ‘behaving ethically and doing the right thing.’

Top 5 factors

Small companies

- #01 Actively trying to minimise their environmental impact (**16%, 5.8**)
- #02 Supporting causes and communities in need (**14%, 5.9**)
- #03 Working towards being carbon neutral (**12%, 5.6**)
- #04 Behaving ethically and doing the right thing (**8%, 5.8**)
- #05 Taking action on climate change (**8%, 5.7**)

Large companies

- #01 Responsible and sustainable use of natural resources (**14%, 5.7**)
- #02 Behaving ethically and doing the right thing (**13%, 5.8**)
- #03 Actively trying to minimise their environmental impact (**11%, 5.8**)
- #04 Working towards being carbon neutral (**8%, 5.6**)
- #05 Taking action on climate change (**7%, 5.6**)

LEGEND (X:X) = (DERIVED IMPACT ON OVERALL ESG RATING VIA REGRESSION MODELLING - %, PERCEIVED PERFORMANCE - AVERAGE OUT OF 10)

Base: All survey participants that gave a numerical rating, excluding “don’t know” response (n=11,219 - 11,277)
Q13. In general, how would you rate the performance of companies in [INSERT COUNTRY] on the following things? You could think of this like giving them a score out of 10. Q6. Overall, how would you rate the performance of the following groups when it comes to acting responsibly on Environmental, Social and Governance (ESG) issues? Model r squared: small companies = 0.49; large companies = 0.60

SECTION 4

How does ESG impact our attitudes and behaviours?

How does ESG impact our **attitudes** and **behaviours**?

The community expects companies to be taking action on ESG issues as part of their business-as-usual approach, and most feel there is considerable room to improve on specific ESG-related measures.

Consumers are looking for a clear and consistent approach to reporting ESG performance.

While there is reluctance to pay more for higher ESG performance in principle, companies are at risk of activism and customers boycotting their products and services if they don't do the right thing - and are exposed for this.

So, what does this mean for companies around the word?

Companies should make a start on ESG action, no matter how small.

They should behave like a good corporate citizen and clearly report their ESG efforts for consumers, backed by independent verification.

Companies should not expect customers to be willing to pay for improving their ESG performance.

Community expectations around ESG performance.

The community expects companies **to be doing more on ESG issues**, particularly in terms of minimising their environmental impact, looking after their employees and taking responsibility for their supply chains.

#01



More than **3 in 4** agreed that companies could be doing more to:

- **Minimise their environmental impact** (78%)
 - **Look after their employees** (77%)
 - **Take responsibility for** the conduct and performance of supply chains (76%)

#02



About **7 in 10** agreed that companies could be doing more to:

- Have processes in place to **identify and stop unethical behaviours** (71%)
- **Support vulnerable or marginalized groups** of society (68%)

Community expectations around ESG reporting.

While very few currently trust what corporates say about their ESG activities, they are interested and are looking for a **clear and consistent approach to reporting** on ESG performance.

#01



About **1 in 2** (51%) agree that they **don't trust what companies claim** about their ESG activities and performance. A further 40% say they neither agree nor disagree, **leaving just 9% who do trust them.**

#02



About **7 in 10** (72%) agreed that **companies should communicate the results of their ESG efforts more clearly** for consumers and investors.

#03



About **7 in 10** (71%) agreed that there should be a **consistent approach for companies to report their ESG performance.**

#04



Nearly **7 in 10** (69%) were **prepared to give a company a second chance if it is transparent about its mistakes** and demonstrates how it will do better in future.

Community expectations around the cost of doing ESG.

The community largely expects **improved ESG performance** to be funded by companies, with some reluctance for consumers to pay more.

#01



About **7 in 10** (71%) agreed that **companies can be profitable while also performing well on ESG.**

#02



About **2 in 3** (67%) agreed that **companies should not pass on the cost for better ESG performance to their customers.**

#03



Just under **1 in 2** (46%) were **prepared to pay more** for products or services from companies with stronger ESG performance.

#04



But **1 in 2** (52%) retail shareholders were **prepared to receive a lower return** on investment in companies with stronger ESG performance.



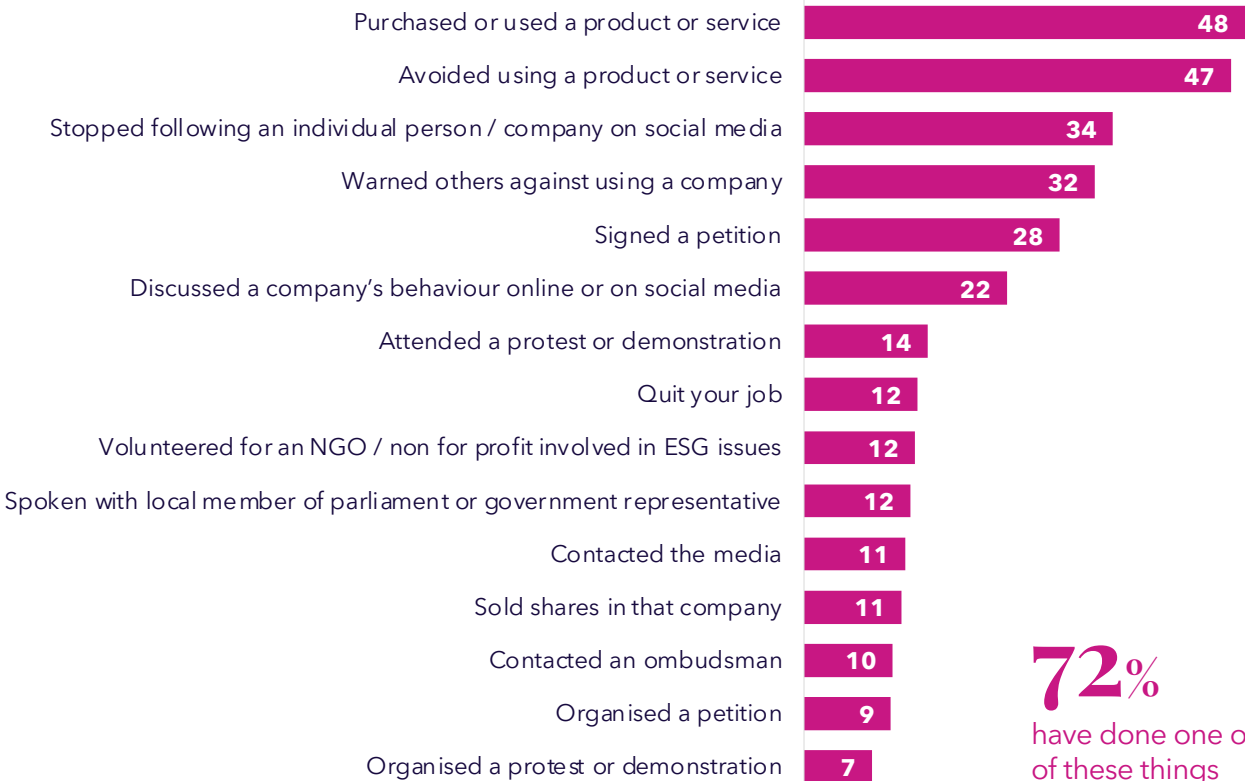
Those willing to pay more...

- Doing well and feeling comfortable financially (61%)
- LGBTQI+ (59%)
- Business owners (57%)

Community activism on ESG issues.

Close to one in two reported having purchased or avoided a product or service in response to an ESG issue. Other common activism behaviours include boycotting people or companies on social media, warning others against using a company, signing a petition and discussing a company's behaviour online.

Response to ESG issues in the last two years (%)



72%
have done one or more of these things

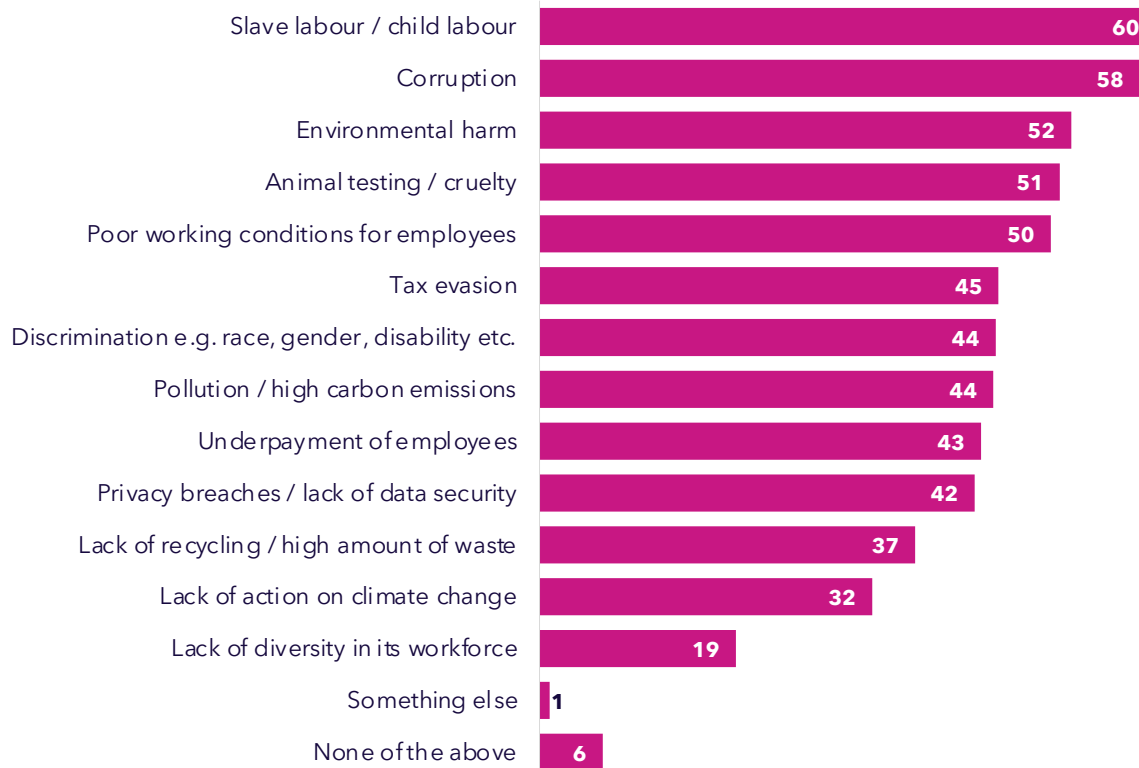
Those more likely to engage in activism on ESG issues...

- LGBTQI+ (83% vs 64%)
- Closely follow news on politics and current affairs (70% vs 56%)
- Younger people (76% aged under 35 vs 61% aged 35+)
- Own a business (81% vs 64%)
- University educated (73% vs. 60%)
- Working (69% vs 58% unemployed / retired)
- Men (68% vs. 63% of women)

ESG issues that result in boycotting.

Participants were prompted with a list and asked which actions would make them genuinely stop or avoid using a company's products or services. Overall, negative actions such as slave labour or child labour, corruption and environmental harm were far more likely to drive consumers away rather than inaction on things like recycling, climate change and diversity.

ESG issues that would influence you to avoid company's products or services (prompted %)



✓
Consumers just want companies to do the right thing

Base: All survey participants (n=12,063)

Q16. Which of the following ESG related actions or issues (if any) would genuinely make you stop or avoid using a company's products or services?
Select all that apply. MULTIPLE RESPONSE

SECTION 5

Country & territory snapshots



All countries / territories (2022).

#01

Top country priorities

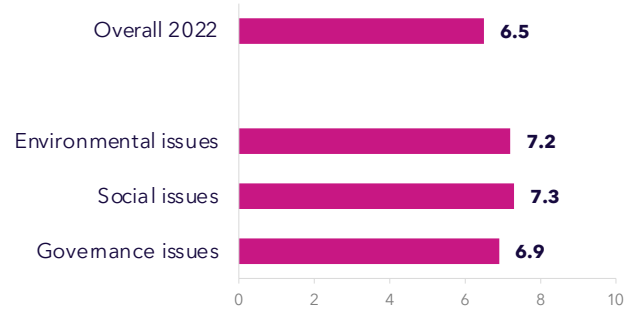
(% RANKING IN TOP 3)

- 1. **Addressing the rising cost of living** (39%)
- 2. **Strengthening the economy** (27%)
- 3. **Ensuring quality, affordable healthcare for everyone** (27%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

(AVERAGE OUT OF 10)



Importance of companies taking action on ESG issues

7.6 out of 10



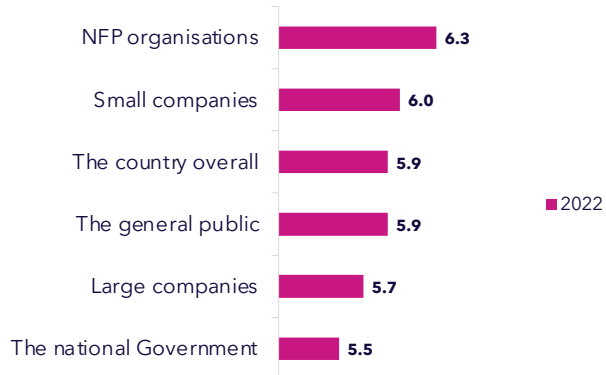
Importance of ESG issues in influencing consumers' own purchase decisions

6.4 out of 10

#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

- 1. **Environmental protection / sustainability (unspecific)** (17%)
- 2. **Climate change / global warming** (11%)
- 3. **Workers' conditions and pay** (7%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

- 1. Healthcare (6.2)
- 2. Supermarkets (6.2)
- 3. Education & training (6.2)

Bottom 3 industries

- 1. Mining and resources (5.2)
- 2. Chemical industry (5.2)
- 3. Alcohol (5.3)

Australia.



#01

Top country priorities

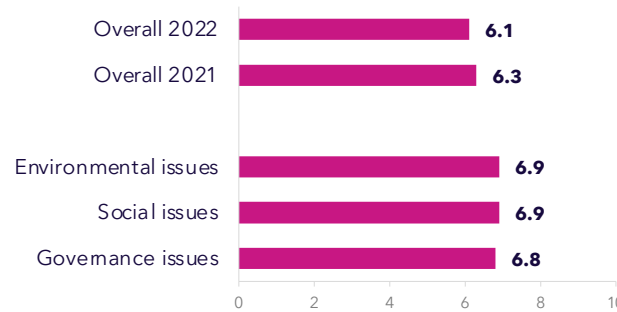
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living** (47%)
2. **Strengthening the economy** (27%)
3. **Ensuring quality, affordable healthcare for everyone** (25%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

(AVERAGE OUT OF 10)



7.5 out of 10



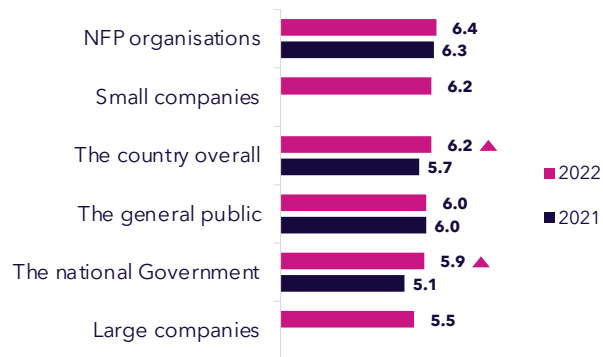
Importance of ESG issues in influencing consumers' own purchase decisions

6.2 out of 10

#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Climate change / global warming** (18%)
2. **Environmental protection / sustainability (unspecific)** (12%)
3. **Reducing waste and plastic use / recycling** (9%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

1. Healthcare (6.3 : 6.5)
2. Supermarkets (6.3 : N/A)
3. Education and training (6.3 : 6.4)

Bottom 3 industries

1. Gaming (4.9 : N/A)
2. Social media platforms (5.0 : N/A)
3. The media (5.1 : N/A)

Legend: (2022 : 2021)

*Small and large companies not asked in 2021



#01

Top country priorities

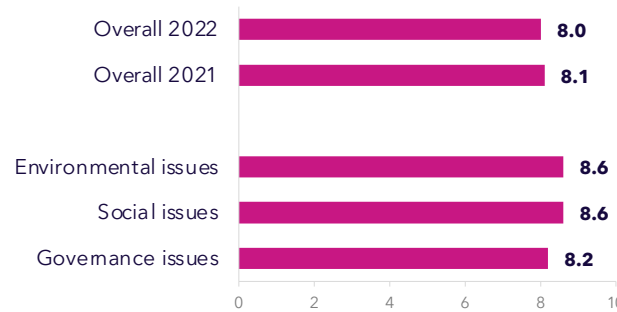
(% RANKING IN TOP 3)

- 1. Improving pay and conditions for workers** (38%)
- 2. Ensuring quality, affordable education for everyone** (38%)
- 3. Reducing crime and violence** (33%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

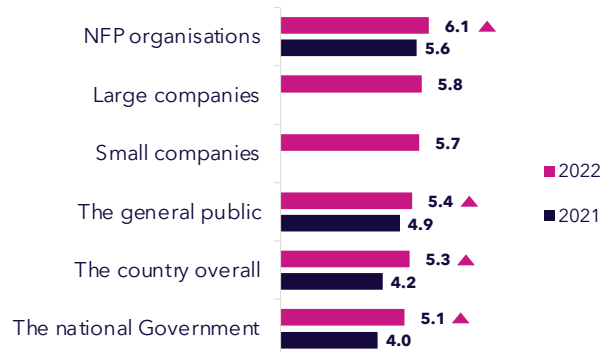
(AVERAGE OUT OF 10)



#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

- 1. Environmental protection / sustainability (unspecific)** (38%)
- 2. Climate change / global warming** (9%)
- 3. Reducing waste and plastic use / recycling** (8%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

- | Top 3 industries | Bottom 3 industries |
|---------------------------------------|---------------------------------------|
| 1. Education / training ▲ (6.0 : 5.1) | 1. Mining and resources ▲ (4.5 : 3.7) |
| 2. Agriculture ▲ (5.9 : 5.6) | 2. Chemical industry ▲ (5.0 : 4.5) |
| 3. Hospitality (5.9 : N/A) | 3. Gaming (5.0 : N/A) |

*Small and large companies not asked in 2021

Legend: (2022 : 2021)



#01

Top country priorities

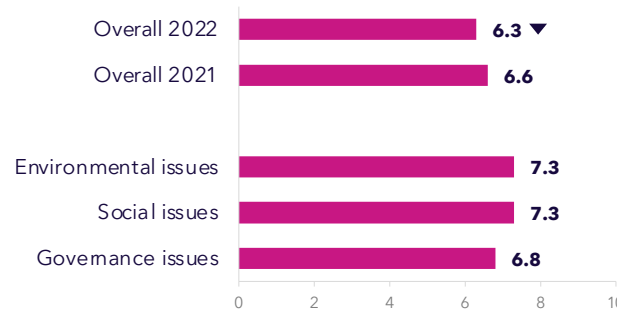
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living** (31%)
2. **Improving pay and conditions for workers** (30%)
3. **Ensuring quality, affordable healthcare for everyone** (28%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

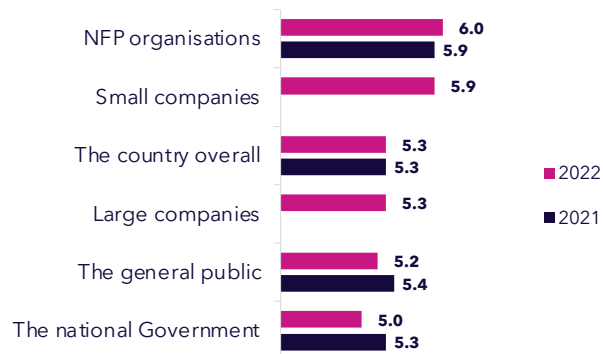
(AVERAGE OUT OF 10)



#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Climate change / global warming** (16%)
2. **Environmental protection / sustainability (unspecific)** (9%)
3. **Workers' conditions and pay** (7%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

- | Top 3 industries | Bottom 3 industries |
|---------------------------------------|-------------------------------------|
| 1. Healthcare ▼ (5.6 : 6.1) | 1. Chemical industry (4.2 : 4.3) |
| 2. Education / training ▼ (5.5 : 5.9) | 2. Airlines ▼ (4.3 : 4.5) |
| 3. Supermarkets (5.5 : N/A) | 3. Mining and resources (4.3 : 4.4) |

Legend: (2022 : 2021)

*Small and large companies not asked in 2021



#01

Top country priorities

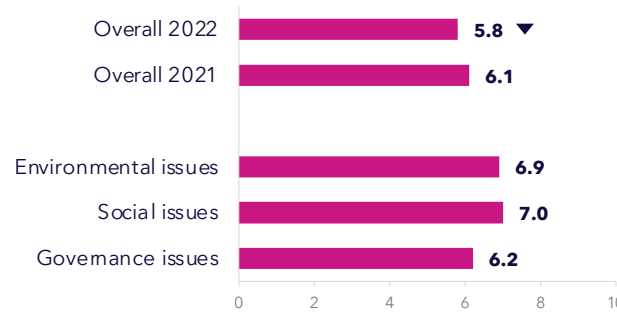
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living** (39%)
2. **Ensuring secure and affordable food supplies** (32%)
3. **Ensuring secure and affordable energy and fuel supplies** (28%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

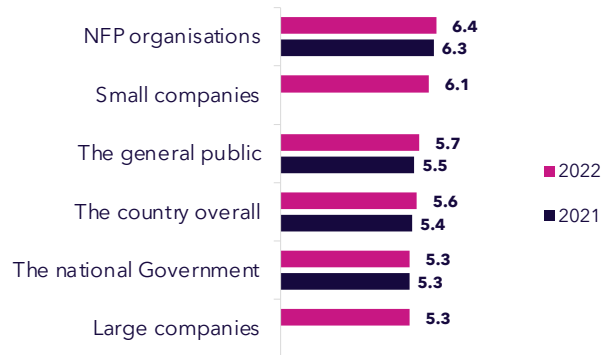
(AVERAGE OUT OF 10)



#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Climate change / global warming** (16%)
2. **Environmental protection / sustainability (unspecific)** (15%)
3. **Workers' conditions and pay** (7%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

- | Top 3 industries | Bottom 3 industries |
|--|----------------------------------|
| 1. Technology and telecommunications (5.8 : 5.9) | 1. Airlines (4.4 : 4.2) |
| 2. Supermarkets (5.8 : N/A) | 2. Alcohol (4.6 : N/A) |
| 3. Agriculture (5.8 : 5.6) | 3. Chemical industry (4.6 : 4.4) |

*Small and large companies not asked in 2021

Legend: (2022 : 2021)

Hong Kong SAR.



#01

Top territory priorities

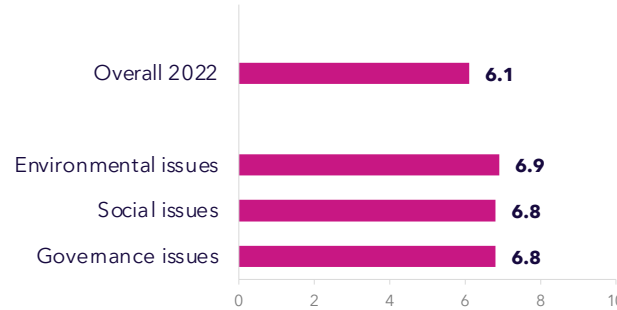
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living** (46%)
2. **Effectively managing the COVID pandemic recovery** (38%)
3. **Strengthening the economy** (37%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

(AVERAGE OUT OF 10)



Importance of companies taking action on ESG issues

7.2 out of 10



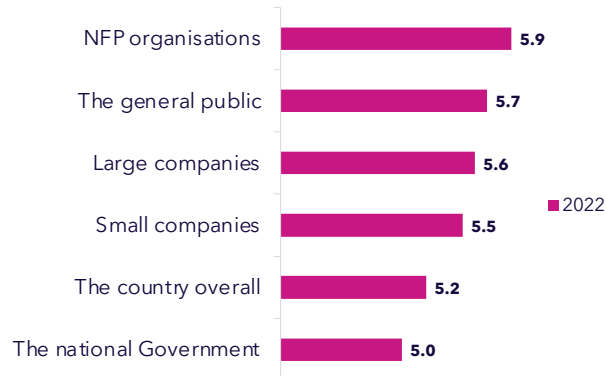
Importance of ESG issues in influencing consumers' own purchase decisions

6.5 out of 10

#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Environmental protection / sustainability (unspecific)** (13%)
2. **Societal fairness / equality / inclusion** (6%)
3. **Reducing waste / recycling** (5%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

1. **Banking and financial services** (6.3)
2. **Technology and telecommunications** (6.1)
3. **Healthcare** (6.1)

Bottom 3 industries

1. **Mining and resources** (5.2)
2. **Chemical industry** (5.3)
3. **Agriculture** (5.4)



#01

Top country priorities

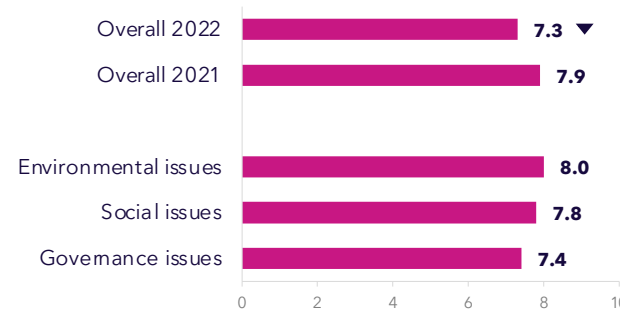
(% RANKING IN TOP 3)

- 1. Improving pay and conditions for workers** (37%)
- 2. Ensuring quality, affordable healthcare for everyone** (30%)
- 3. Addressing the rising cost of living** (30%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

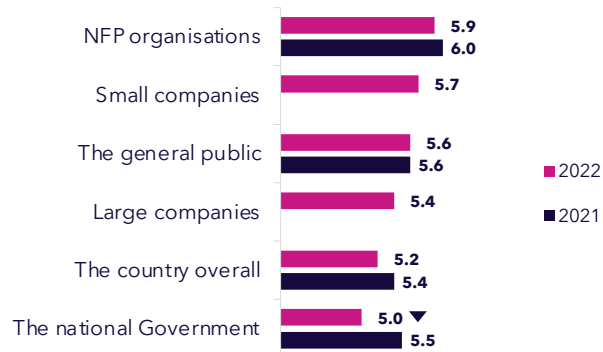
(AVERAGE OUT OF 10)



#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

- 1. Environmental protection / sustainability (unspecific)** (19%)
- 2. Climate change / global warming** (15%)
- 3. Workers' conditions and pay** (15%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

- | Top 3 industries | Bottom 3 industries |
|------------------------------|----------------------------------|
| 1. Supermarkets (6.0 : N/A) | 1. Airlines (5.0 : 5.1) |
| 2. Agriculture ▼ (5.9 : 6.1) | 2. Chemical industry (5.0 : 5.0) |
| 3. Hospitality (5.9 : N/A) | 3. Alcohol (5.1 : N/A) |

*Small and large companies not asked in 2021

Legend: (2022 : 2021)



#01

Top country priorities

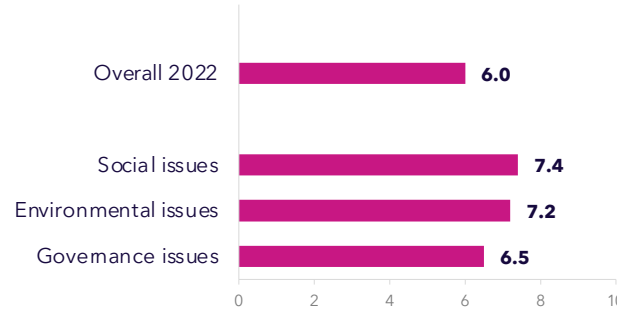
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living** (41%)
2. **Strengthening the economy** (33%)
3. **Ensuring secure and affordable energy and fuel supplies** (32%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

(AVERAGE OUT OF 10)



Importance of companies taking action on ESG issues

7.5 out of 10



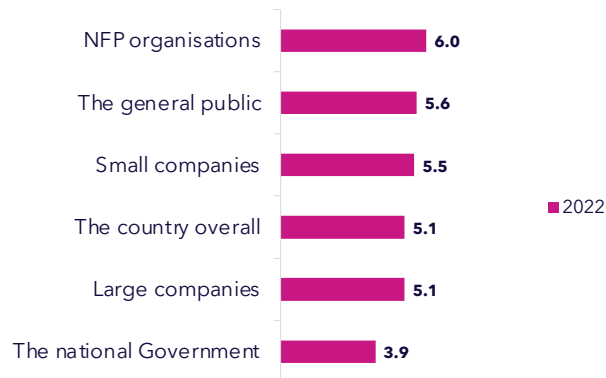
Importance of ESG issues in influencing consumers' own purchase decisions

5.9 out of 10

#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Environmental protection / sustainability (unspecific)** (34%)
2. **Workers' conditions and pay** (10%)
3. **Social issues (unspecific)** (6%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

1. Online marketplaces and e-commerce (6.0)
2. Technology and telecommunications (5.9)
3. Banking and financial services (5.8)

Bottom 3 industries

1. Mining and resources (4.8)
2. Chemical industry (5.2)
3. Airlines (5.2)



#01

Top country priorities

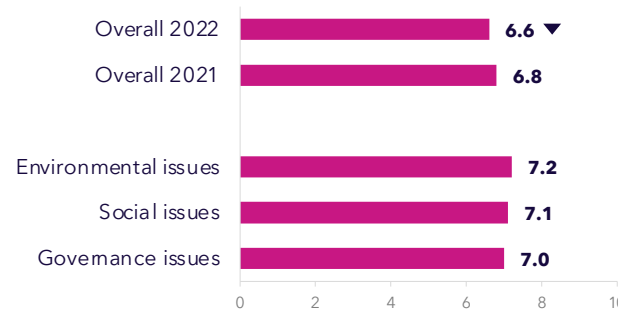
(% RANKING IN TOP 3)

- 1. Addressing the rising cost of living** (54%)
- 2. Ensuring secure and affordable energy and fuel supplies** (31%)
- 3. Ensuring quality, affordable healthcare for everyone** (31%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

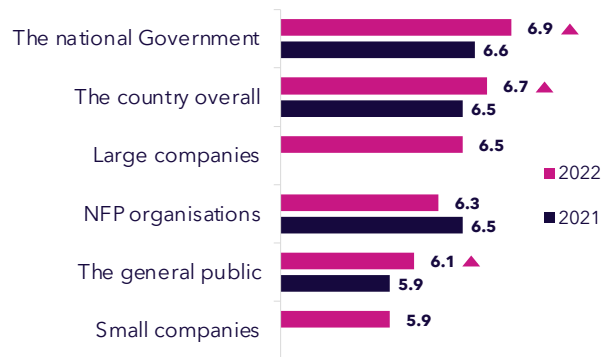
(AVERAGE OUT OF 10)



#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

- 1. Climate change / global warming** (16%)
- 2. Environmental protection / sustainability (unspecific)** (14%)
- 3. Reducing waste and plastic use / recycling** (12%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

- | Top 3 industries | Bottom 3 industries |
|---|---------------------------------------|
| 1. Healthcare (6.8 : 6.8) | 1. Mining and resources (5.8 : 5.5) ▲ |
| 2. Education and training (6.8 : 6.7) | 2. Alcohol (5.8 : N/A) |
| 3. Banking and financial services (6.6 : 6.6) | 3. Fashion (5.9 : N/A) |

*Small and large companies not asked in 2021

Legend: (2022 : 2021)



#01

Top country priorities

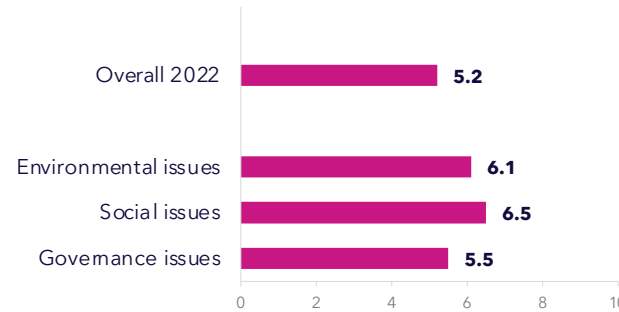
(% RANKING IN TOP 3)

1. **Reducing crime and violence** (45%)
2. **Ensuring quality, affordable healthcare for everyone** (31%)
3. **Ensuring secure and affordable energy and fuel supplies** (25%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

(AVERAGE OUT OF 10)



Importance of companies taking action on ESG issues

7.2 out of 10



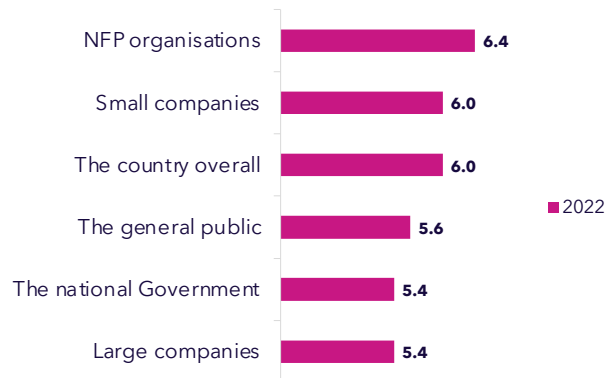
Importance of ESG issues in influencing consumers' own purchase decisions

5.0 out of 10

#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Environmental protection / sustainability (unspecific)** (18%)
2. **Climate change / global warming** (6%)
3. **Reducing carbon footprint** (6%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

1. Agriculture (6.2)
2. Education and training (6.1)
3. Healthcare (6.1)

Bottom 3 industries

1. Airlines (4.4)
2. Fashion (4.5)
3. Gaming (4.6)

United Arab Emirates (UAE).



#01

Top country priorities

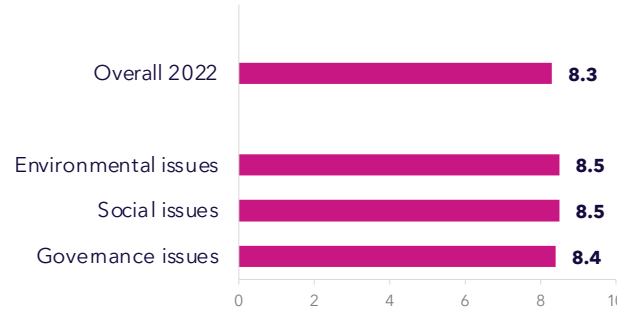
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living** (33%)
2. **Improving pay and conditions for workers** (33%)
3. **Ensuring quality, affordable healthcare for everyone** (27%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

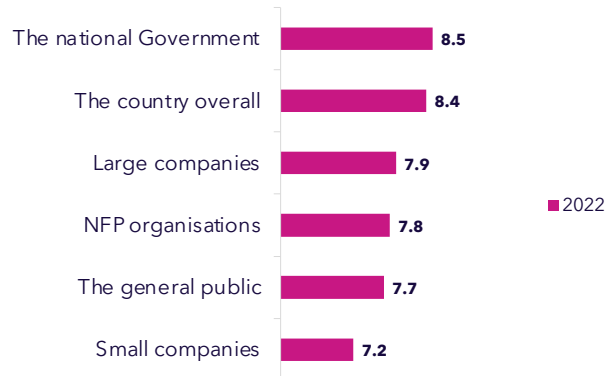
(AVERAGE OUT OF 10)



#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Environmental protection / sustainability (unspecific)** (15%)
2. **Climate change / global warming** (12%)
3. **Workers' conditions and pay** (12%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

1. **Airlines** (8.3)
2. **Healthcare** (8.2)
3. **Technology and telecommunications** (8.2)

United Kingdom (UK).



#01

Top country priorities

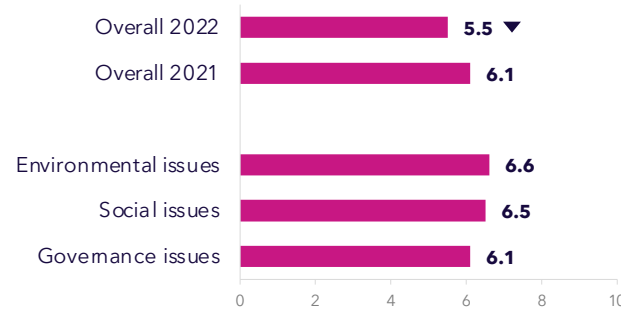
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living** (52%)
2. **Ensuring secure and affordable energy and fuel supplies** (32%)
3. **Ensuring secure and affordable food supplies** (29%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

(AVERAGE OUT OF 10)



7.3 out of 10



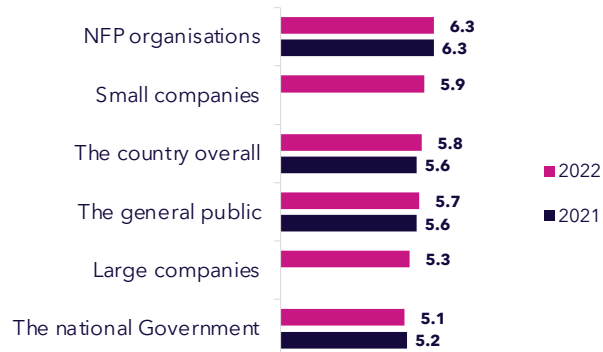
Importance of ESG issues in influencing consumers' own purchase decisions

5.7 out of 10

#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Climate change / global warming** (13%)
2. **Environmental protection / sustainability (unspecific)** (12%)
3. **Reducing waste and plastic use / recycling** (10%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

1. Healthcare (6.1 : 6.3)
2. Education and training (6.1 : 6.2)
3. Supermarkets (6.0 : N/A)

Bottom 3 industries

1. Airlines (4.4 : 4.6)
2. Mining and resources (4.5 : 4.6)
3. Fashion (4.6 : N/A)

Legend: (2022 : 2021)

*Small and large companies not asked in 2021

United States of America (USA).



#01

Top country priorities

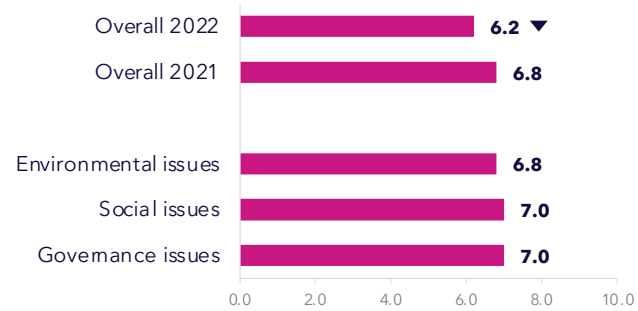
(% RANKING IN TOP 3)

1. **Addressing the rising cost of living**
(42%)
2. **Strengthening the economy**
(36%)
3. **Reducing crime and violence**
(28%)

#02

Interest in ESG

(AVERAGE OUT OF 10)



#03

Perceived importance of ESG

(AVERAGE OUT OF 10)



Importance of companies taking action on ESG issues

7.3 out of 10



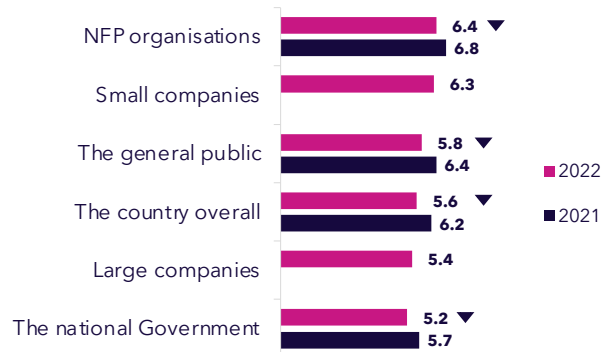
Importance of ESG issues in influencing consumers' own purchase decisions

6.2 out of 10

#04

Ratings of ESG performance

(AVERAGE OUT OF 10)



#05

Top 3 ESG concerns

1. **Climate change / global warming**
(13%)
2. **Environmental protection / sustainability (unspecific)**
(9%)
3. **Workers' conditions and pay**
(8%)

#06

Industry ESG ratings

(AVERAGE OUT OF 10)

Top 3 industries

1. Supermarkets (6.4 : N/A)
2. Agriculture ▼ (6.3 : 6.7)
3. Healthcare ▼ (6.1 : 6.7)

Bottom 3 industries

1. The media (5.0 : N/A)
2. Chemical industry ▼ (5.1 : 5.6)
3. Social media platforms (5.3 : N/A)

*Small and large companies not asked in 2021

Legend: (2022 : 2021)

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