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Insight. Communications. Advocacy.

GLOBAL REPORT

ESG MONITOR 2024

WHAT IS THE PUBLIC'S VIEW ON RESPONSIBLE BUSINESS IN 2024?

Background & methodology

For the fourth year running, SEC Newgate has conducted this major survey to understand community awareness and perceptions around Environmental, Social and Governance (ESG) issues.

15-minute
online survey

14,352
people surveyed across **14 countries and territories**

Participants were sourced from global panel provider PureProfile, with the survey translated and completed in-language where appropriate. Fieldwork was conducted over the period 4-29 July 2024.

Quotas were set by age, gender and location to ensure a nationally representative sample of citizens aged 18+, and the final results were weighted by the actual age and gender proportions within each country or territory. For the 'total' results, each country is given equal weighting.

Country / Territory n=	2024	2023	2022	2021
Australia	1,034	1,015	1,003	1,000
(NEW IN 2024) Brazil	1,019	NA	NA	NA
Colombia	1,028	1,001	1,018	1,039
France	1,043	1,005	1,000	1,010
Germany	1,009	1,005	1,003	1,014
(NEW IN 2024) Greece	1,056	NA	NA	NA
Hong Kong SAR (HK SAR)	1,027	1,002	1,004	NA
Italy	1,013	1,002	1,005	1,006
Poland	1,007	1,009	1,000	NA
Singapore	1,022	1,010	1,008	1,027
Spain	1,028	1,008	NA	NA
United Arab Emirates (UAE)	1,017	1,002	1,009	NA
United Kingdom (UK)	1,036	1,009	1,006	1,017
United States of America (USA)	1,013	1,012	1,001	1,031

Other notes

1. Survey questions and sample sizes are shown at the bottom of each page. Unless otherwise specified, questions were asked of all participants.
2. Results may not always total 100% due to rounding or questions allowing multiple-responses.

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Summary of key insights

In 2024, there is a clear gap between the standards communities expect governments and businesses to uphold on ESG matters, and their performance in meeting those expectations. And there is a strong view that organisations should consider the needs of *all* stakeholders, rather than prioritising shareholders. While people want companies to speak publicly on important issues, communication about broader social and environmental issues needs to be very carefully considered if it strays from core business or what staff and customers care about.

Governments and businesses are falling well below the public's ESG-related expectations. There are strong expectations for governments and large businesses to act responsibly in terms of ESG considerations, with most deeming this to be highly important. Expectations are somewhat lower for small to medium businesses, which naturally tend to have smaller footprints. However, all were rated relatively poorly for their performance on this front, with just over half rating governments and large businesses at 7 or more out of 10, and slightly more for small to medium businesses.

The top five rated industries for conducting their business responsibly were renewable energy, supermarkets/grocery stores, technology and telecommunications, education and training, and hospitality. The worst rated were alcohol, mining and resources, nuclear energy, gaming, and the chemical industry. Importantly though, highlighting the substantial room for improvement, even the highest rated only saw 55% of people giving a rating of 7 or more out of 10.

78%
think companies should **act in the best interests of *all* stakeholders** rather than prioritising shareholders – including the large majority of investors (71%)

There is also a strong belief that performing well on ESG responsibilities doesn't have to come at the expense of profitability – i.e. **companies can be both responsible AND profitable.**

Further, the large majority (65%) believe companies should play a more active role in society – although as the following findings show, getting the balance right is critical.

While people are still very much focused on their immediate needs in terms of addressing issues in their country, they also care a lot about broader social and environmental issues. Healthcare, crime and the cost of living dominate concerns, but three quarters (74%) also agree the renewable energy transition is highly important for their country's future. Further, very few (just 22%) think the transition is happening too fast. Other key issues include acting on forced and child labour (52% rated this 9 or 10 out of 10 on importance), and protecting the natural environment and wildlife (52%).

Despite continued low cut-through of the term "ESG", the fundamental concept holds relevance, with a high average interest level rating of
7.2 out of 10

Awareness of 'ESG' as a concept is largely similar to 2023, with slightly over half saying they were aware of the term - and yet only 21% thought they had a good understanding of what it is. Despite this, there is still a core of around 3 in 10 people who remain very highly interested in ESG issues, rating this 9 or 10 out of 10.

The community places the most importance on businesses focusing on impacts related to their core functions – and in particular, treating employees fairly, providing high quality products or services, and being open and transparent. There is much less expectation for companies to speak publicly on issues – especially political and social issues not directly connected to the company or its stakeholders.

Summary of key insights cont'd

When considering perceived performance based on what matters most to people, the top five opportunities to better meet community expectations are: being open and transparent, treating employees fairly, acting to improve sustainability and reduce environmental harm, supporting and collaborating with local communities, and having leaders who are focused on conducting business in responsible ways.

Not surprisingly, factors related to the financial returns of an investment are the top drivers when making decisions to invest, with growth prospects, anticipated financial return and the risk profile of the company or investment being the most important. However, ethical decision making, and sustainability and environmental factors are also important criteria to many – especially women, posing important implications to businesses in the 'Great Wealth Transfer' underway across the globe.

There are far-reaching risks to businesses engaging in unethical behaviour or practices, with as many as **half of all investors**

- 49% -

saying they would sell their investment in a company if they found it had engaged in unethical behaviour.

Shortcomings in ESG-related communications are clear to see, with close to three in four people believing companies need to more clearly communicate what they are doing to improve their performance on ESG issues, as well as their actions to address the needs of their stakeholders. This is particularly crucial when considering how important being clear and transparent is to the public.

The large majority still believe it is highly important for companies to speak publicly about environmental and social issues that are relevant to their stakeholders, as well as issues that are important to employees and customers.

However, only about half feel it is important for companies to speak publicly on political issues or on social issues that are not necessarily related to the business. Further demonstrating the sensitivities and risks here, four in ten agree that companies focused on ESG initiatives are too politically focused.

Communication needs to be carried out in ways that overcome the scepticism, with almost half indicating they don't trust what companies say about their ESG actions.

That said, the public has overwhelmingly positive associations with companies that are focused on addressing ESG issues, and are most likely to pick words such as 'sustainability', 'future focused', 'responsible', 'green', 'respectful', 'good citizen', and 'caring'.

While very few people know what the term means, once presented with a definition…

- 63% -

think greenwashing is a big problem in their country

These positive associations not only resonate well but also demonstrate how important it is for companies to take ESG actions seriously, talk about them and feature them in their communications. Words such as 'distracted' and 'naive' were not strong associations, supporting the idea that ESG is an area people wants to see companies focus on. However, it is imperative that companies genuinely and accurately communicate their commitment and performance on ESG-related issues.

While words such as 'fake' and 'unsuccessful' were not frequently associated with companies addressing ESG issues, negative associations like these are likely to increase if the community perceives dishonesty or disingenuity in what companies say – especially if they stray too far beyond core business, or if there is a rise in regulators calling out greenwashing.

Chapter 1.

Community concerns and interests

Perceived direction country/territory is heading in

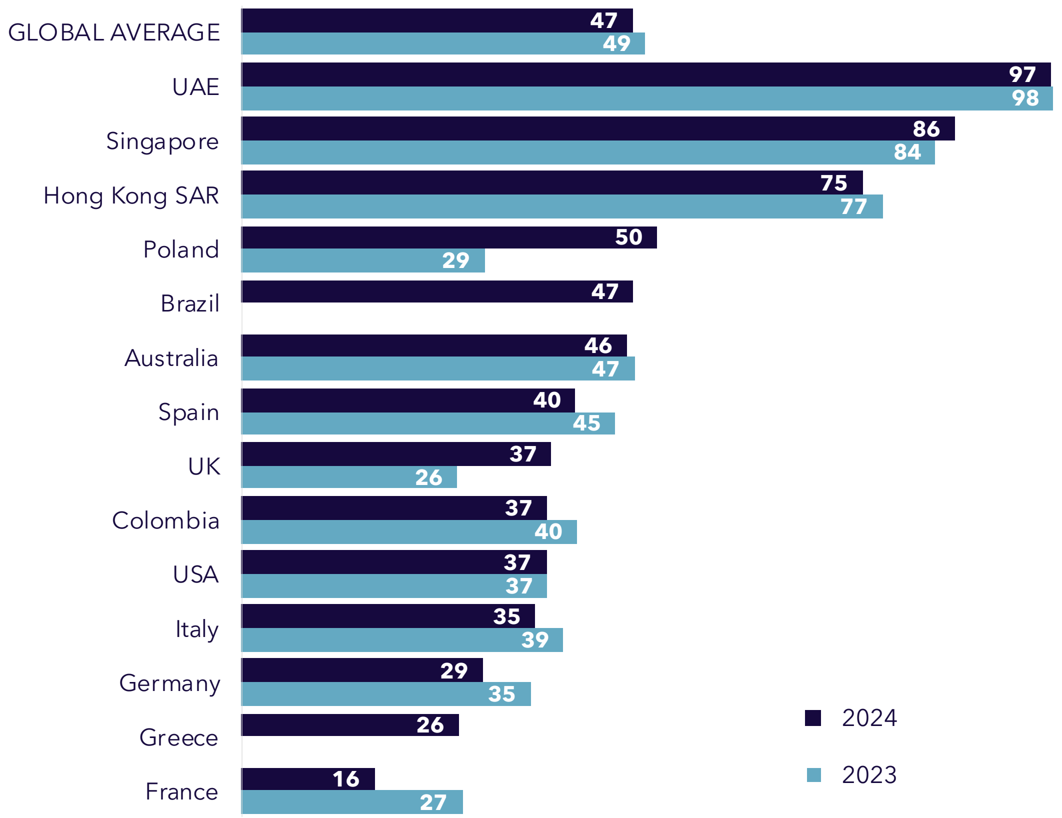
Opinions vary widely by country, with optimism again the highest in the UAE, Singapore and Hong Kong. Despite some gains vs 2023, on balance the majority believe their country is heading in the wrong direction.

Perceived direction country/territory is heading in

(% WHO SAY IT'S ON THE RIGHT TRACK)

47% think their country/territory is heading on the right track

53% think their country/territory is heading in the wrong direction



Levels of optimism are similar to 2023 in about half of the countries surveyed, while there are significant lifts in Poland and the UK, and a stark decline in France.

Q1. Overall, do you think that things in [country/territory] are heading on the right track or in the wrong direction?

Top 5 Issues

(FOR THE FUTURE OF ONE'S OWN COUNTRY)

1. Ensuring quality, affordable healthcare for everyone
2. Reducing crime and violence
3. Addressing the rising cost of living
4. Ensuring secure and affordable food supplies
5. Strengthening the economy

People are still very much focused on their immediate needs, but they also care a lot about broader social and environmental issues.

The importance of issues remains largely consistent with 2023, although notable shifts are seen for managing the impact of wars (+5 percentage points) and addressing the cost of living (-4).

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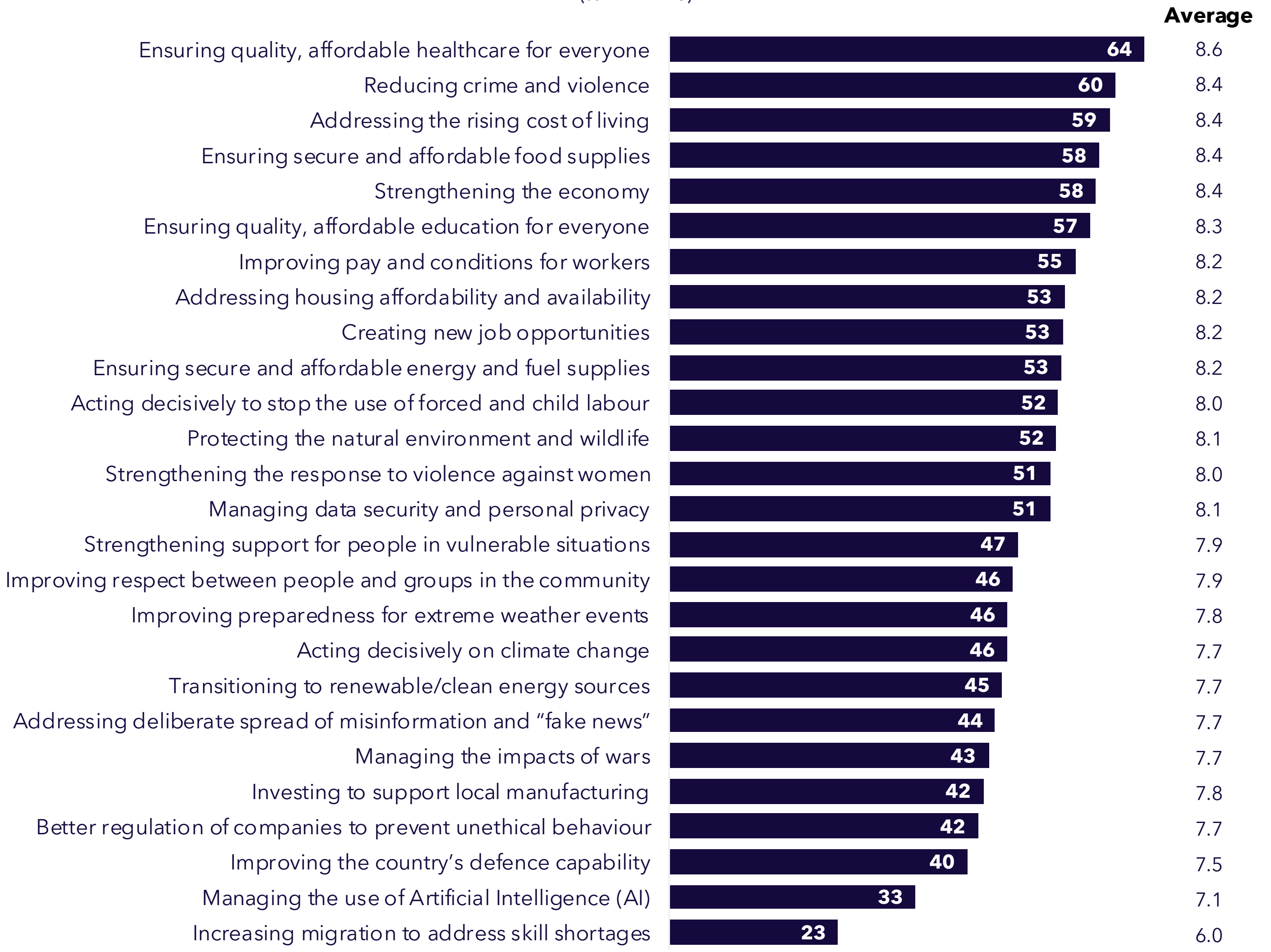
Importance of issues for the future of country

(% NET 9-10)



Q19. The following are things that some people believe are important for [country/territory] future. How important are these things to you personally?

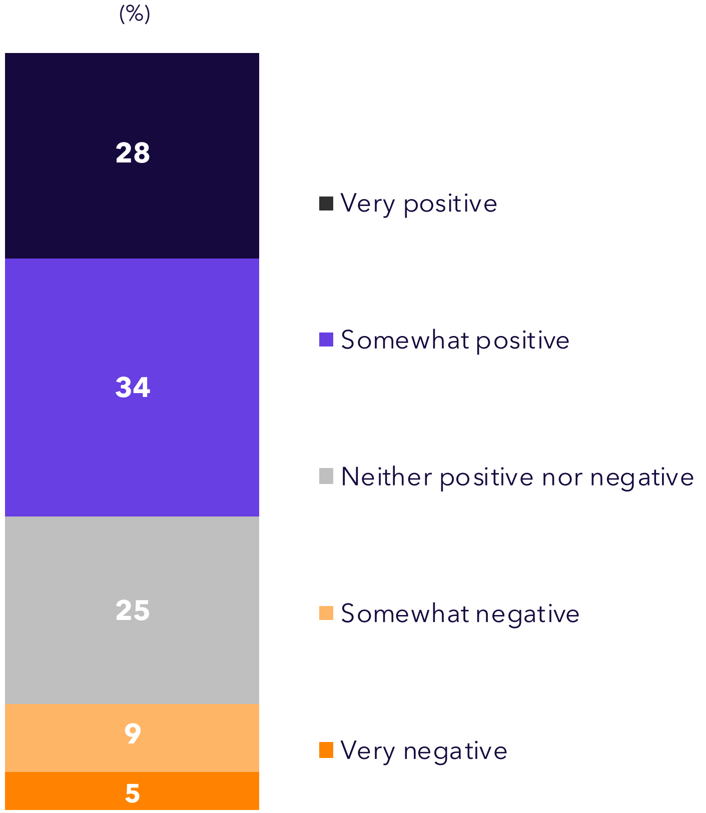
Feelings towards the renewable energy transition

Though the energy transition is lower on the list of people's priorities, three quarters still feel it is highly important for their country's future – so sentiment is largely positive, and many more people think it's too slow than too fast.

Feelings towards the energy transition

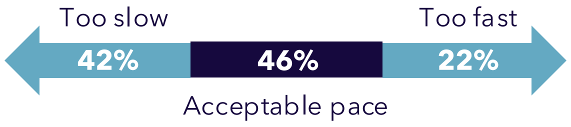
74%
say it's highly important for their country to transition to renewable/ clean energy sources
*rated as 7-10 out of 10

74%
also think it's highly important for their country to act decisively on climate change
*rated as 7-10 out of 10



Countries that feel *most* positive:
1. UAE (89%)
2. Singapore (71%)
3. Italy (69%)
4. Colombia (68%)
5. Brazil (63%)

Countries that feel *least* positive:
1. Greece (41%)
2. Poland (49%)
3. Australia (55%)
4. UK (56%)
5. Spain (59%)



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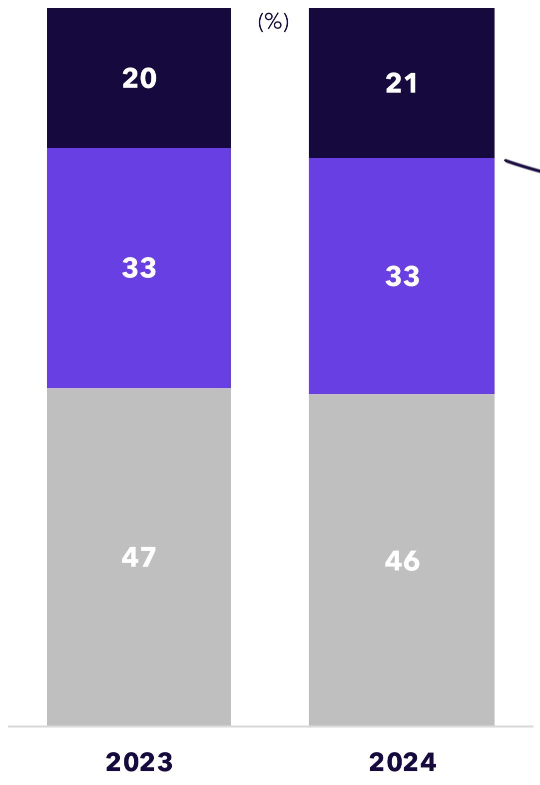
Q70. Overall, do you feel positive or negative about [country/territory] transitioning electricity generation away from coal and other fossil fuels to renewables like solar and wind?
Q71. In [country/territory], do you think transitioning electricity generation away from coal and other fossil fuels, to renewables like wind and solar, is moving…?
Q19. The following are things that some people believe are important for [country/territory's] future. How important are these things to you personally?

Awareness and understanding of ESG

Looking specifically at the term "ESG", salience remains very low. Still only a little over half have even heard of it – but most are unsure of what it is. Only one in five people felt they had a good understanding of ESG.

Awareness and understanding of ESG



Those aware of ESG were more likely to be:

- Males
- Aged under 50
- University educated
- Closely follow the news

■ Heard of ESG and have a good understanding of what it means

■ Heard of ESG but not sure what it means

■ Hadn't heard of ESG

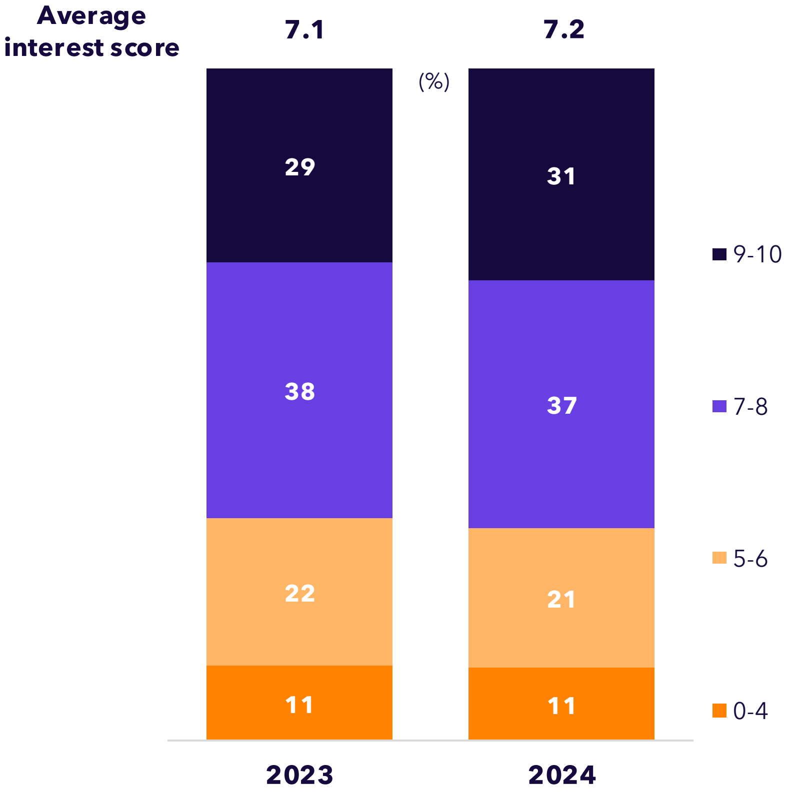
Country	Heard of ESG and have a good understanding of what it means (%)	
	2023	2024
Hong Kong SAR	48	43
Singapore	33	41
UAE	33	39
Brazil	NA	27
USA	22	23
GLOBAL AVERAGE	**20**	**21**
UK	13	18
Italy	16	17
Australia	14	17
France	13	14
Germany	12	14
Greece	NA	11
Colombia	12	11
Poland	8	9
Spain	9	9

Q3. Before today, had you heard of the term "ESG" which stands for "Environmental, Social and Governance (ESG)"?

Interest in ESG issues

Interest in ESG remains reasonably high though: after explaining the concept, about a third indicate they are highly interested in ESG issues, with an average rating of 7.2 out of 10.

Interest in ESG issues



Despite limited salience and understanding of the term, the very concept of ESG remains highly relevant to the public, with an average interest rating of 7.2 out of 10.

Who was **most interested**:

- Females
- Aged under 50
- University educated
- Working people
- Close followers of the news

Country	**Highly interested in ESG issues** (% NET 9-10)	
	2023	**2024**
Brazil	NA	60
UAE	53	58
Colombia	44	51
Greece	NA	34
Italy	42	33
GLOBAL AVERAGE	**29**	**31**
Spain	28	30
USA	28	29
Poland	28	25
Hong Kong SAR	35	23
Singapore	18	23
France	24	22
Australia	17	18
UK	13	17
Germany	16	17

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Q4. How interested are you in Environmental, Social and Governance (ESG) issues, if at all? (0 = not at all, 10=extremely interested) *(See appendix for full ESG definition given)*

Chapter 2.

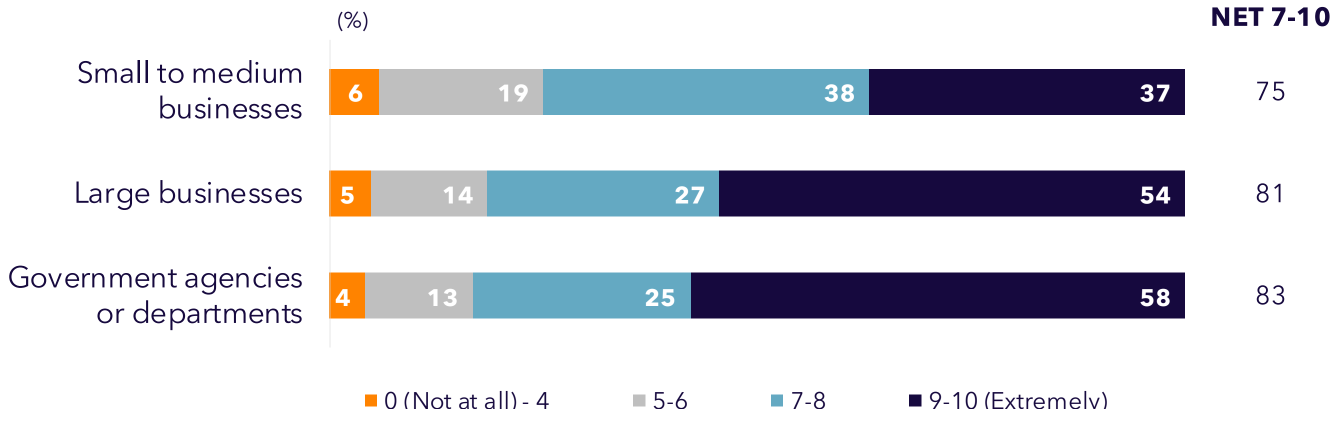
Expectations of corporates

Businesses and governments are not meeting the public's ESG-related expectations.

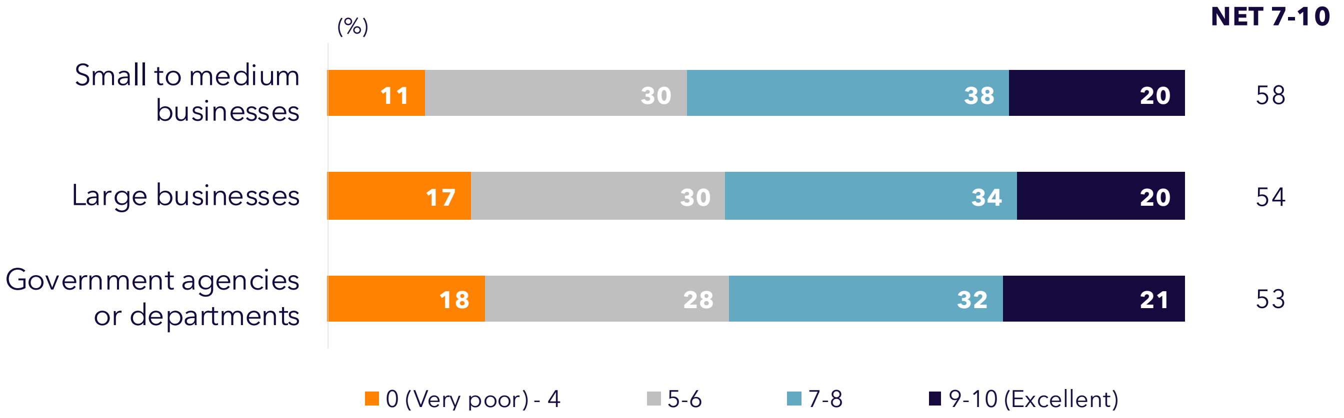
There are strong expectations for governments to act responsibly in terms of ESG considerations, with nearly three in five (58%) giving this an importance rating of 9 or 10 out of 10. A similar majority (54%) said the same for large businesses, while expectations are lower for small to medium businesses (37%).

However, people gave lacklustre performance ratings across all three groups, with just over half rating governments and large businesses at 7 or more out of 10 (53% and 54%). Ratings were a little higher for small to medium businesses (58%).

Importance of conducting business in responsible ways



Performance on conducting business in responsible ways



Q23a. How important do you personally think it is for the following to conduct their business in responsible ways – in terms of their environmental, social and governance considerations?
Q23b. Overall, how would you rate the performance of the following that operate in [country/territory] when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations?

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Role of companies in society

Two thirds believe that companies should play a more active role in society – but as we will see, getting the balance right is critical.

There is also strong belief that performing well on ESG responsibilities doesn't have to come at the expense of profitability, while people overwhelmingly believe companies should act in the best interests of all stakeholders rather than prioritising shareholders ahead of other stakeholders.

Role of companies in society

65% agree

They expect companies to **play a more active role in society** these days

73% agree

Companies can be profitable while also performing well on their environmental, social and governance responsibilities

78% think

Companies should **act in the best interests of all stakeholders**, including shareholders

Even 71% of investors believe this (and 84% of non-investors)

Q60. Which one of the following best describes your view on who companies should act in the best interests of? Stakeholders includes anyone who has an interest in a company or could be affected by decisions or actions – e.g. customers, employees, government, communities in which they operate, and shareholders. A) Companies should act in the best interests of their shareholders (i.e. those who own shares or stocks in the company) ahead of other types of stakeholders. B) Companies should act in the best interests of all stakeholders, including shareholders.
Q15. To what extent do you agree or disagree with the following statements?

Belief that companies should act in best interest of all stakeholders

Across all countries, the substantial majority believe companies should act in the best interest of all stakeholders, rather than prioritising shareholders over other stakeholders. While this attitude is a little more prevalent among non-investors, it is also shared widely by investors in all countries.

Belief that companies should act in best interest of all stakeholders

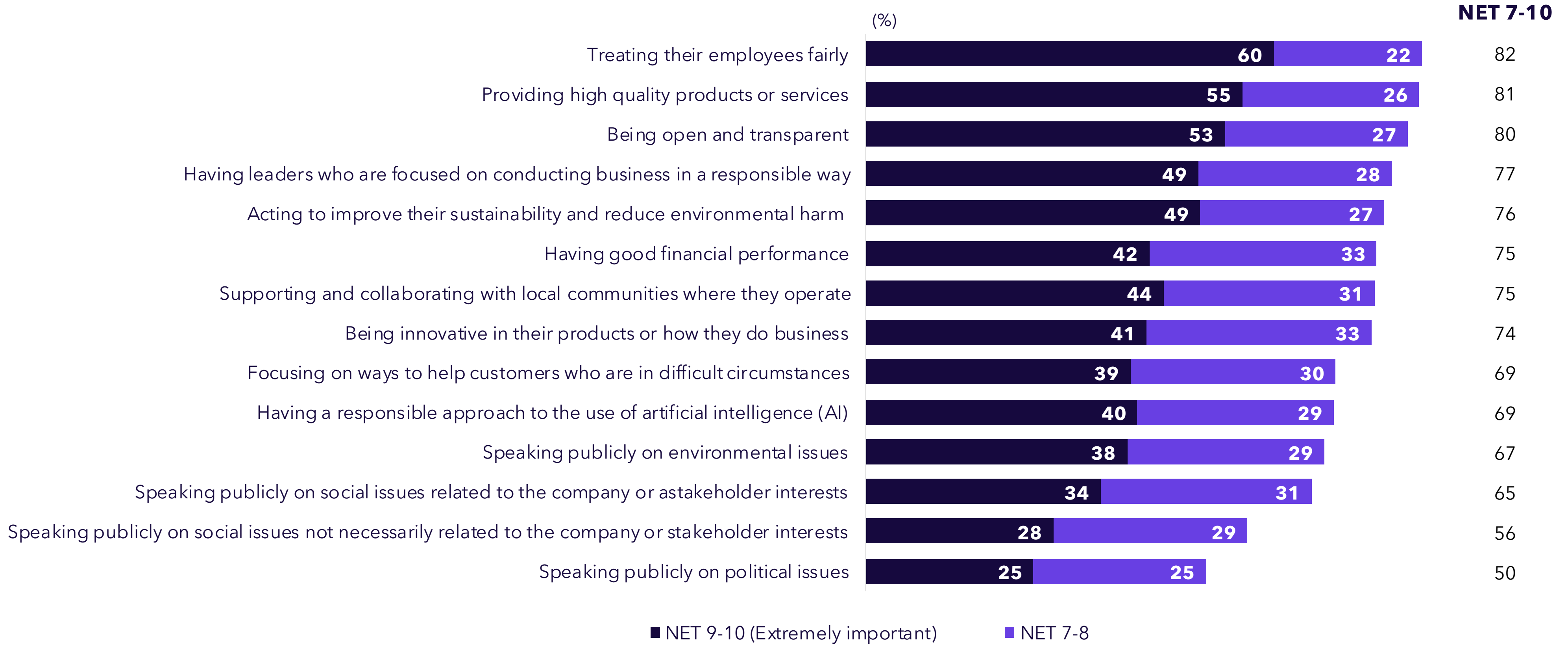
(%)		Investors	Non-investors
Brazil	86	83	89
Australia	83	78	89
Greece	83	77	87
Germany	82	73	88
France	82	71	86
Colombia	82	77	83
UK	81	76	84
Spain	81	73	85
GLOBAL AVERAGE	78	**71**	**84**
Italy	77	73	80
USA	75	67	81
Poland	72	61	77
Singapore	71	69	79
UAE	67	64	77
Hong Kong SAR	64	64	68

Q60. Which one of the following best describes your view on who companies should act in the best interests of? Stakeholders includes anyone who has an interest in a company or could be affected by decisions or actions – e.g. customers, employees, government, communities in which they operate, and shareholders. A) Companies should act in the best interests of their shareholders (i.e. those who own shares or stocks in the company) ahead of other types of stakeholders. B) Companies should act in the best interests of all stakeholders, including shareholders.

Importance of company actions

The community places most importance on businesses **focusing on impacts and activities related to their core function – and in particular, treating employees fairly, providing high quality products or services, and being open and transparent**. There is a much lower expectation for companies to speak publicly on issues – especially political and social issues that don't have a direct connection to the company or its stakeholders.

Importance of company actions



Q15a. How important do you personally think it is for companies in [country/territory] to be doing each of the following things? Scale: 10 = extremely important, 0 = not at all important.

Areas of focus to meet community expectations

Looking at the areas of importance in light of the perceived performance of businesses provides guidance for businesses on where efforts should be focused to better meet community expectations of corporate behaviours.

1 MOST important and room for improvement

- **Being open and transparent**
- **Treating their employees fairly**
- **Acting to improve their sustainability and reduce environmental harm**
- **Supporting and collaborating with local communities where they operate**
- **Having leaders who are focused on conducting business in a responsible way**

2 SOMEWHAT important and room for improvement

- Having a responsible approach to the use of artificial intelligence (AI)
- Focusing on ways to help customers who are in difficult circumstances
- Speaking publicly on environmental issues
- Speaking publicly on social issues that are related to the company or the interests of its stakeholders

3 IMPORTANT and performing relatively well

- Providing high quality products or services
- Having good financial performance
- Being innovative in their products or how they do business

4 Lowest priority

- Speaking publicly on social issues that are not necessarily related to the company or the interests of its stakeholders
- Speaking publicly on political issues

Q15a. How important do you personally think it is for companies in [country/territory] to be doing each of the following things?
Q15b. How would you rate the performance of companies in [country/territory] on the following?

Performance of industries in conducting business in responsible ways

Sentiment varies widely by industry, with renewable energy rated highest.

TOP PERFORMING INDUSTRIES:

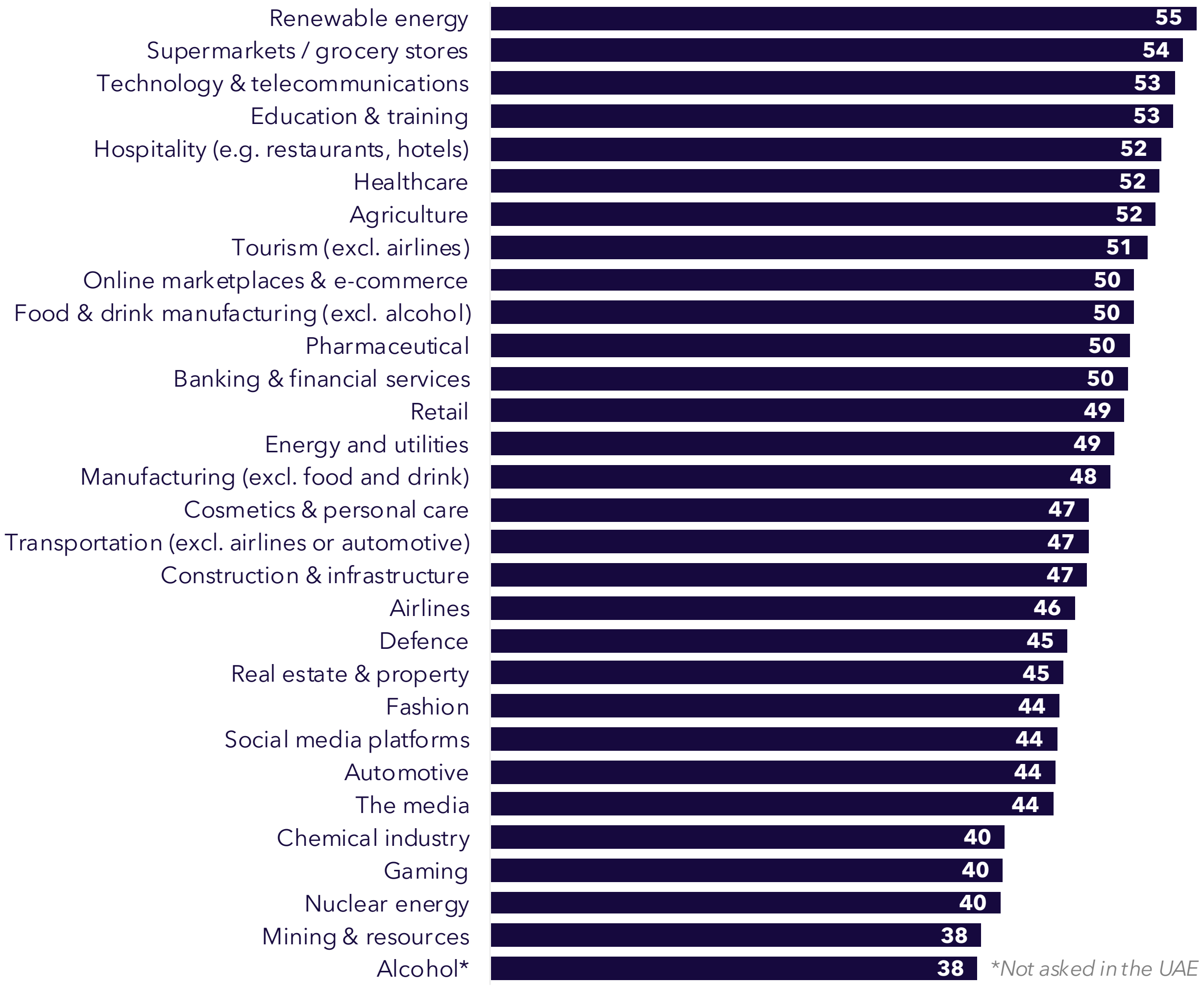
1. Renewable energy (55%)
2. Supermarkets/grocery stores (54%)
3. Technology & telecommunications (53%)
4. Education & training (53%)
5. Hospitality (52%)

BOTTOM PERFORMING INDUSTRIES:

26. Chemical industry (40%)
27. Gaming (40%)
28. Nuclear energy (40%)
29. Mining and resources (38%)
30. Alcohol (38%)

Performance of industries in conducting business in responsible ways

(% NET 7-10)



Q11. How would you rate the performance of the following industries operating in [country/territory] when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations?

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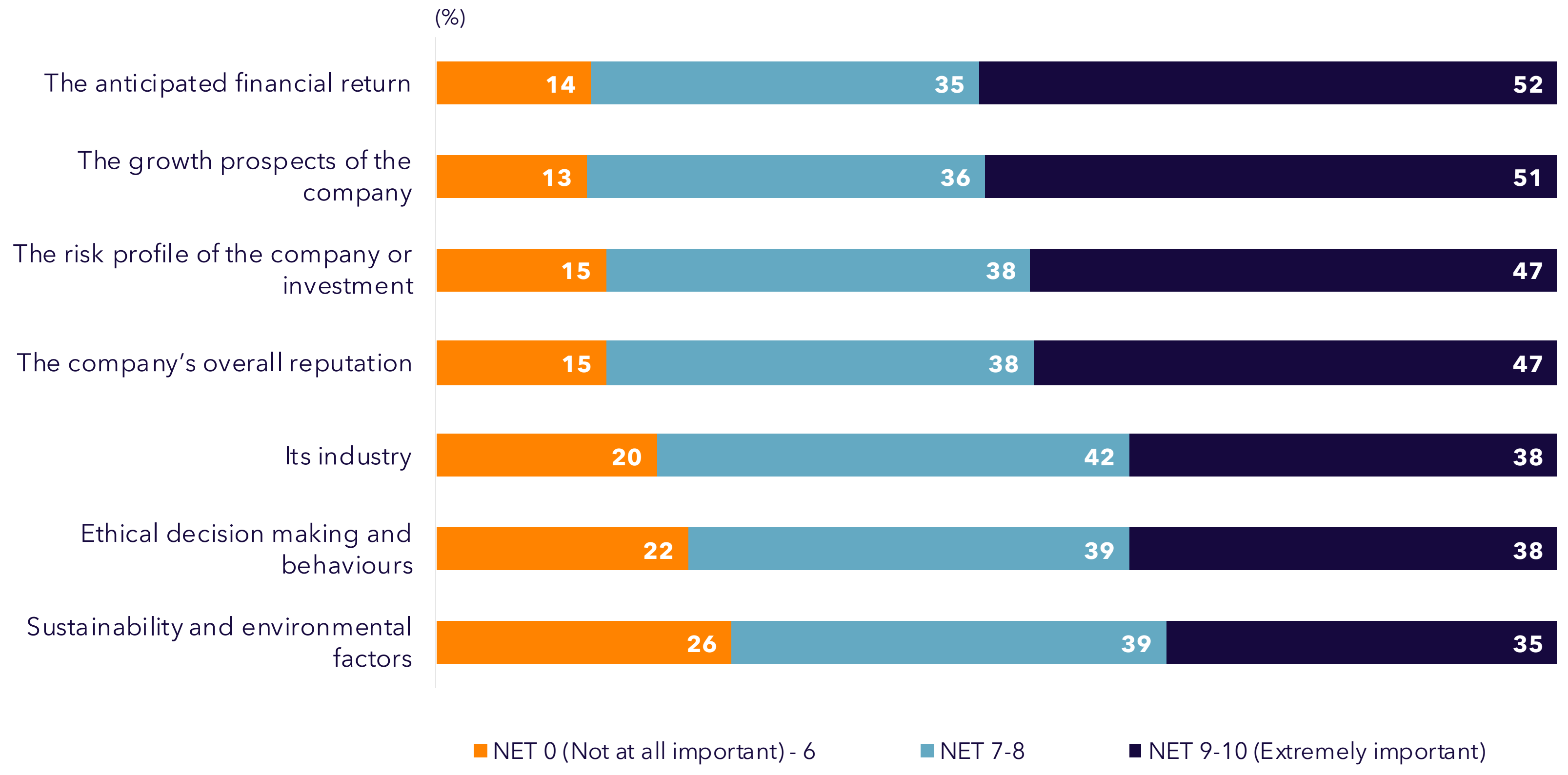
Chapter 3.

Investment decision making

Importance of factors in investment decisions

Factors related to the financial returns of an investment are the top drivers when making decisions to invest, but ethical decision making, and sustainability and environmental factors are also important to many – particularly women, suggesting significant implications for companies given the trend of the 'great wealth transfer' to women.

Importance of factors in investment decisions



	NET 9-10		TOTAL
	Males	Females	Average rating
The anticipated financial return	51	52	8.3
The growth prospects of the company	51	52	8.3
The risk profile of the company or investment	46	49	8.2
The company's overall reputation	45	50	8.2
Its industry	38	39	7.8
Ethical decision making and behaviours	36	42	7.7
Sustainability and environmental factors	33	38	7.5

Note - female statistics in blue font indicate that it is a statistically significantly higher result than for males

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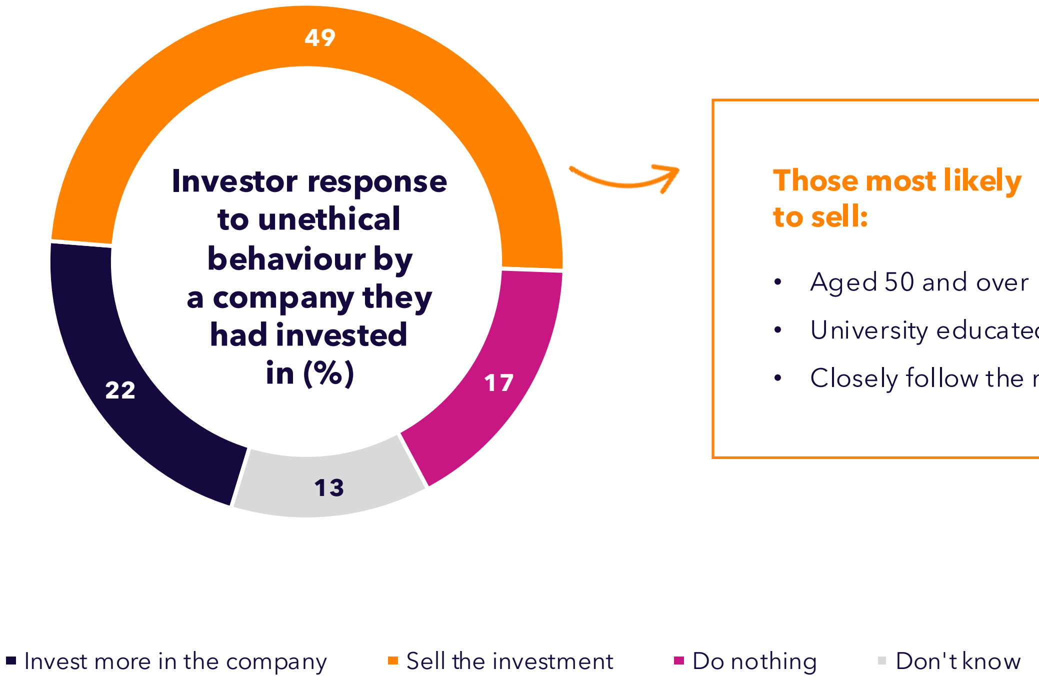
Q43. For each of the following factors, please indicate how important each is to you personally when making a decision to invest in a company. BASE: Investors only

Investor action regarding unethical company behaviour

With half of the investor community saying they are likely to sell an investment if unethical behaviour or practices have occurred, the risks such behaviour poses to corporate reputation and share prices are extensive - and an important warning.

Investor action regarding unethical company behaviour or practice



Those most likely to sell:

- Aged 50 and over
- University educated
- Closely follow the news

Country	% Sell the investment
UAE	65
Colombia	64
Singapore	57
Brazil	54
USA	52
Greece	52
GLOBAL AVERAGE	**49**
Hong Kong SAR	47
UK	46
Australia	45
Italy	42
Poland	40
Spain	37
France	37
Germany	34

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Q44. If you found out there was unethical behaviour or practices at a company you had invested in, which was otherwise meeting your investment objectives, would you be most likely to…?
BASE: Investors only

Chapter 4.

Communications considerations

Sentiment towards companies ‘speaking out’

The large majority believe it is highly important for companies to speak publicly about environmental and social issues that are relevant to their stakeholders, more so than broader or political issues. This suggests consumers have reservations about companies getting distracted from their core responsibilities and impacts.

Sentiment towards companies ‘speaking out’

73% **agree**

companies should **speak out on issues that are important** to their employees and customers, and…

67%
feel it is very important for companies to speak publicly on environmental issues*

65%
say the same about social issues related to the company or interests of stakeholders*

However, the **community is more evenly divided on companies speaking out on other issues**…

56%
feel it is very important for companies to speak publicly on social issues that are not necessarily related to the company or the interests of its stakeholders*

50%
feel it is very important for companies to speak publicly on political issues*

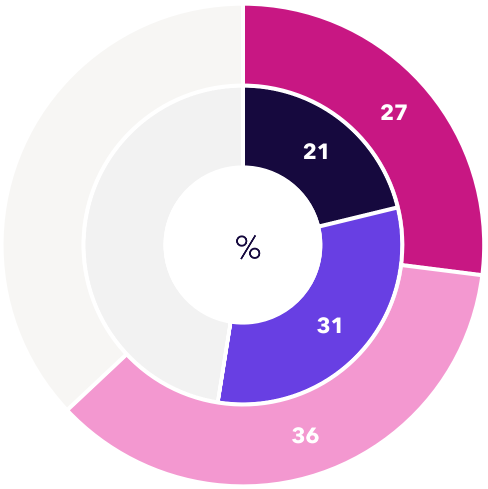
Q15a. How important do you personally think it is for companies in [country/territory] to be doing each of the following things?
Q15. To what extent do you agree or disagree with the following statements?

*Rated as 7-10 out of 10

Greenwashing concerns

About half are aware of the term 'greenwashing' but very few believe they have a good understanding of what it is. However, once given a definition, 63% think it's a big problem in their country.

Greenwashing concerns



The proportion who had heard of greenwashing rose from **47% in 2023 to 53% this year**, but an unchanged **63% think it is a big problem** (rated this 7-10)

- Heard of Greenwashing and have a good understanding of what it means
- Heard of Greenwashing but am not sure what it means
- How much of a problem Greenwashing is (NET 9-10)
- How much of a problem Greenwashing is (NET 7-8)

Country	Heard of greenwashing and have a good understanding (%)	How much of a problem greenwashing is (% NET 7-10)
Germany	39	61
UAE	30	63
UK	30	54
Singapore	28	55
Italy	24	70
Australia	23	61
USA	22	61
Hong Kong SAR	22	57
GLOBAL AVERAGE	**21**	**63**
Greece	15	73
Poland	15	54
Brazil	15	76
France	15	65
Spain	12	61
Colombia	8	76

Q33. Before today, had you heard of the term "Greenwashing"?
Q34: As you may already know, "Greenwashing" is when a company provides misleading or false information to consumers or investors about how environmentally friendly, sustainable or ethical its products and/or operations are. How much of a problem do you think Greenwashing is among companies in [country/territory], if at all? (0 = not at all to 10 = a major problem)

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Company communications about ESG issues

Corporate communication shortcomings are clear to see, with a large majority believing companies need to more clearly communicate what they are doing to improve their performance on ESG issues and address stakeholder needs.

This is increasingly an issue in light of the Corporate Sustainability Reporting Directive (CSRD) requirements coming into force in the EU, as well as other country-specific legislation around disclosure.

Furthermore, a considered approach is needed to overcome scepticism, with many not trusting what companies claim about ESG and given that many believe companies focused on ESG initiatives are too politically focused.

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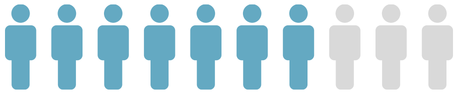
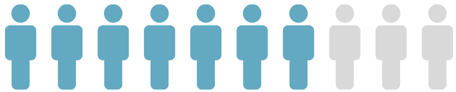
Company communications about ESG issues



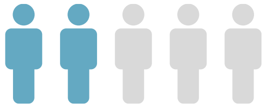
73% agree

Companies should **more clearly communicate what they are doing to improve their performance** on environmental, social and governance issues



72% agree

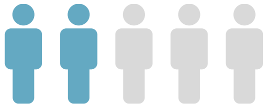
Companies should **more clearly communicate what they are doing to address the needs** of their stakeholders



44% agree

I don't trust what companies claim about their ESG activities or performance

Note: The French were much more likely to agree (62%) than any other country



40% agree

Companies focused on ESG initiatives are **too politically focused**

Q15. To what extent do you agree or disagree with the following statements?

Words associated with ESG-focused companies

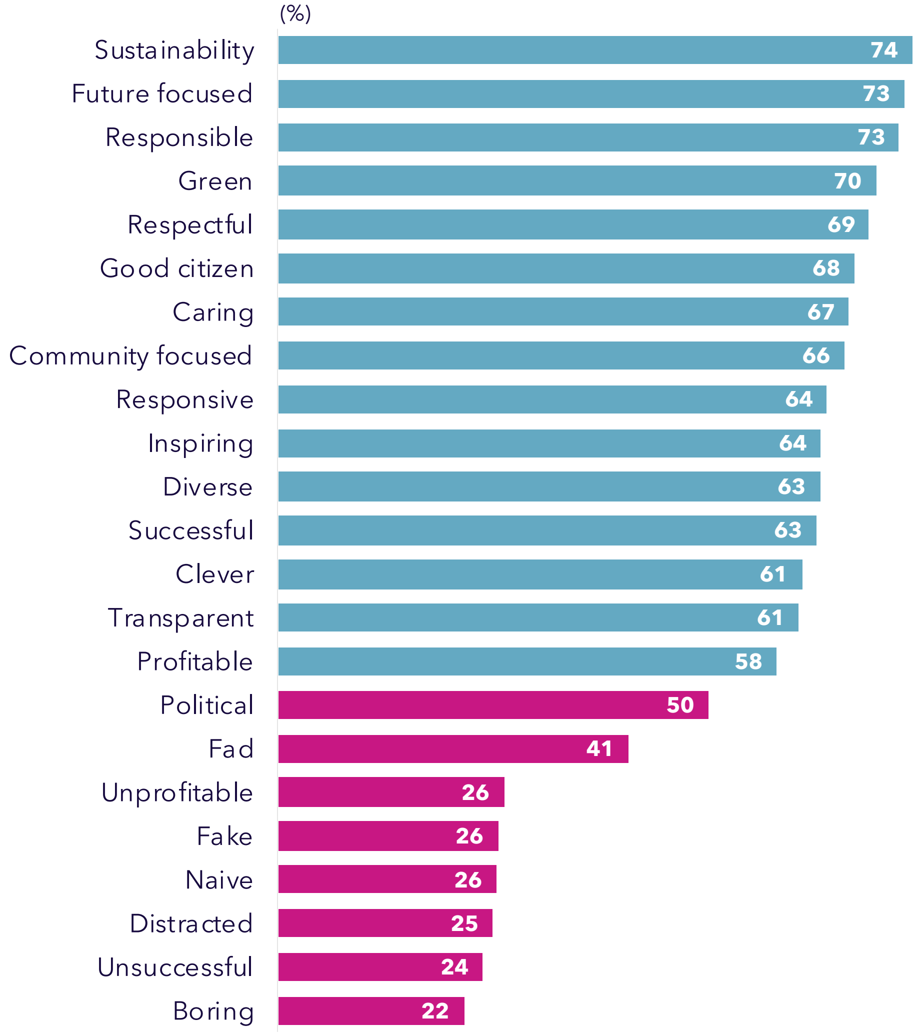
The public has overwhelmingly positive associations with companies that are focused on addressing ESG issues.

From this long list, they picked words such as ‘sustainability’, ‘future focused’, ‘responsible’, ‘green’, ‘respectful’, ‘good citizen’, and ‘caring’ most often.

These values demonstrate how important it is for companies to incorporate ESG into their operations to improve positive public perceptions.

While words such as ‘fake’ and ‘unsuccessful’ were not frequently associated with companies addressing ESG issues, negative associations may increase with perceptions of dishonesty or disingenuity. With one in two people seeing ESG-focused companies as political, this strengthens the caution for businesses to not stray too far into politics.

Words associated with ESG-focused companies



Positive associations more likely among:

- University educated
- Those who closely follow the news on politics and current affairs
- Those more comfortable financially

Negative associations more likely among:

- Males
- Those who do not closely follow the news on politics and current affairs
- Those having financial difficulty

Q12b. Which of these words or phrases do you associate with companies that are focused on addressing environmental, social and governance issues?

Key take-aways for organisations

1.

Despite other pressing concerns of the public in their day to day lives, most still see environmental, social and governance issues as important to address – even if they don't view these through a formal 'ESG' lens

2.

People have high expectations of organisations to behave responsibly on ESG matters, and yet the scorecard for governments and businesses remains underwhelming

3.

The public largely welcomes companies speaking out on issues that are relevant to their stakeholders – including environmental and social issues – but there is a high degree of sensitivity to greenwashing, politics, and potential community and investor backlash that companies need to be wary of

APPENDIX

How we defined ESG in this study

The issue of terminology in a study like this is fraught with difficulty and we're aware that the term ESG has particular connotations in different countries.

We investigated the use of different terms in focus groups in 2022 but found similar issues or limitations with other phrases. For example, many felt the term sustainability referred primarily to actions that protect the environment.

On balance, most liked the use of ESG as a framework for companies to use to hold themselves to account on the issues that matter most to the community.

After asking participants whether they had heard of the term ESG, which we said stands for 'Environmental, Social and Governance', they were shown the text below.

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.

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