Climate Action Confidence Tracker

APCO worldwide®

In partnership with

WBC World Business Council for Sustainable Development

FOREWORD

Record-breaking fires. Unprecedented flooding. Water shortages. Scientists' warnings about shrinking biodiversity. Millions of lives—and livelihoods—at stake. We're all worried about the devastating effects of climate change. As the science tells us, it is becoming increasingly urgent to do something about climate change together as citizens of the planet.

As we approach the 28th United Nations Climate Change Conference (COP28), we're preparing to assess global progress toward cutting emissions and mitigating global warming as part of the first-ever global stocktake. APCO wanted to contribute to the global understanding of this hugely complex problem that affects all of us. Many areas of climate change have been well studied, so we tried to pick some areas, particularly surrounding public perception, that perhaps aren't as well understood. Our data contributes to the total landscape so that we can uncover opportunities for governments, businesses, and individuals to act meaningfully.

We recognize that there's no one solution to solving climate change. More than 140 countries have set hard targets to achieve net zero emissions, an important step. But it is also clear our efforts to do so are falling short. Now comes the hard part: garnering the financial and technological resources to implement change and communicating effectively to motivate buy-in from all stakeholders.

In the face of these challenges, APCO remains committed to trying to understand and reduce our own environmental impact while engaging constructively with businesses, governments, and other stakeholders to catalyze action. We have partnered with the World Business Council for Sustainable Development (WBCSD) to delve deeper into the issues and perceptions surrounding climate change through our first Climate Action Confidence Tracker. By collaborating with WBCSD, APCO aims to contribute valuable insights to companies, governments, and organizations striving to combat climate change and create a positive impact.

Through this survey conducted by our APCO Insight team, we have gathered essential information that will aid all of us in making informed decisions and communicating them effectively to a global population. Moreover, the insights derived from the Climate Action Confidence Tracker will empower other companies, just like ours, to make the right decisions so that we properly address climate risks and opportunities today, assuring long-term corporate sustainability and profitability. We are very grateful to the more than 24,000 participants who have taken the time to contribute to a global effort to foster sustainability and combat climate change. Together, we can pave the way for a more sustainable future for generations to come.

Margery Kraus
Founder and Executive Chairperson
APCO Worldwide

FOREWORD

In the face of global challenges, the world is increasingly turning to businesses for sustainability solutions. The urgency to tackle climate change is clear, yet a misalignment with financial markets hinders business climate action. Progress can accelerate when businesses are accountable for their performance toward climate, nature, and equity targets and innovate and invest accordingly, and when capital markets then respond with positive incentives to reward and further promote such corporate performance. That's the way sustainability gets done. It's not a buzzword; it's a commitment to a better world of business and finance working together to properly address climate-related issues and other challenges in ways that resonate with people.

The survey presented in this report is important, and WBCSD is deeply grateful to APCO for its work. The APCO Climate Action Confidence Tracker shows that consumers across the world are concerned about climate change. They are also optimistic the challenge can be solved and seek intensified efforts toward meeting 2050 net zero targets. Importantly, they see the scale-up of business innovation and technology as a key solution. They also see the need for both compliance and incentives to tackle greenwashing and to spur innovation. Yet they find it difficult to know who is doing what to contribute and, as a result, who the leaders in the transition are. The consumer signal identified by this survey is clear: a common and transparent framework that helps society to easily recognize and reward ambitious climate-related business performance and accountability would be greatly welcomed.

As COP28 approaches, understanding and leveraging such public sentiment will be vital to shape business and government actions and communication strategies and to gain support for inevitable trade-offs. Engaging the public in dialogue on how best to strengthen corporate performance, transparency, and accountability is pivotal as leading governments, corporations, financial sector actors, and civil-society stakeholders seek to radically scale up climate action to 2050.

At WBCSD, we are committed to helping leading companies create common performance and accountability frameworks, bridge the gap in aligning corporate climate action with financial market incentives, and unlock business action and innovation at scale. Our commitment to transformative solutions and accountability finds resonance in the climate-related Corporate Performance and Accountability System (CPAS). We are supporting the world's leading businesses to engage in transforming and strengthening our current systems for climate-related corporate performance and accountability. We are inviting key organizations to join hands to improve the systems that business operates within. We advocate for the global adoption of the climate disclosures standards of the International Sustainability Standards Board (ISSB).

The path forward demands creative thinking, bold action, collaboration, and speed. The public around the world, as this survey shows, wants transparent, accountable, trustworthy, and clearly communicated frameworks that incentivize and showcase credible business action on climate. Let us not let them, or future generations, down.

Dominic Waughray
Executive Vice President
WBCSD
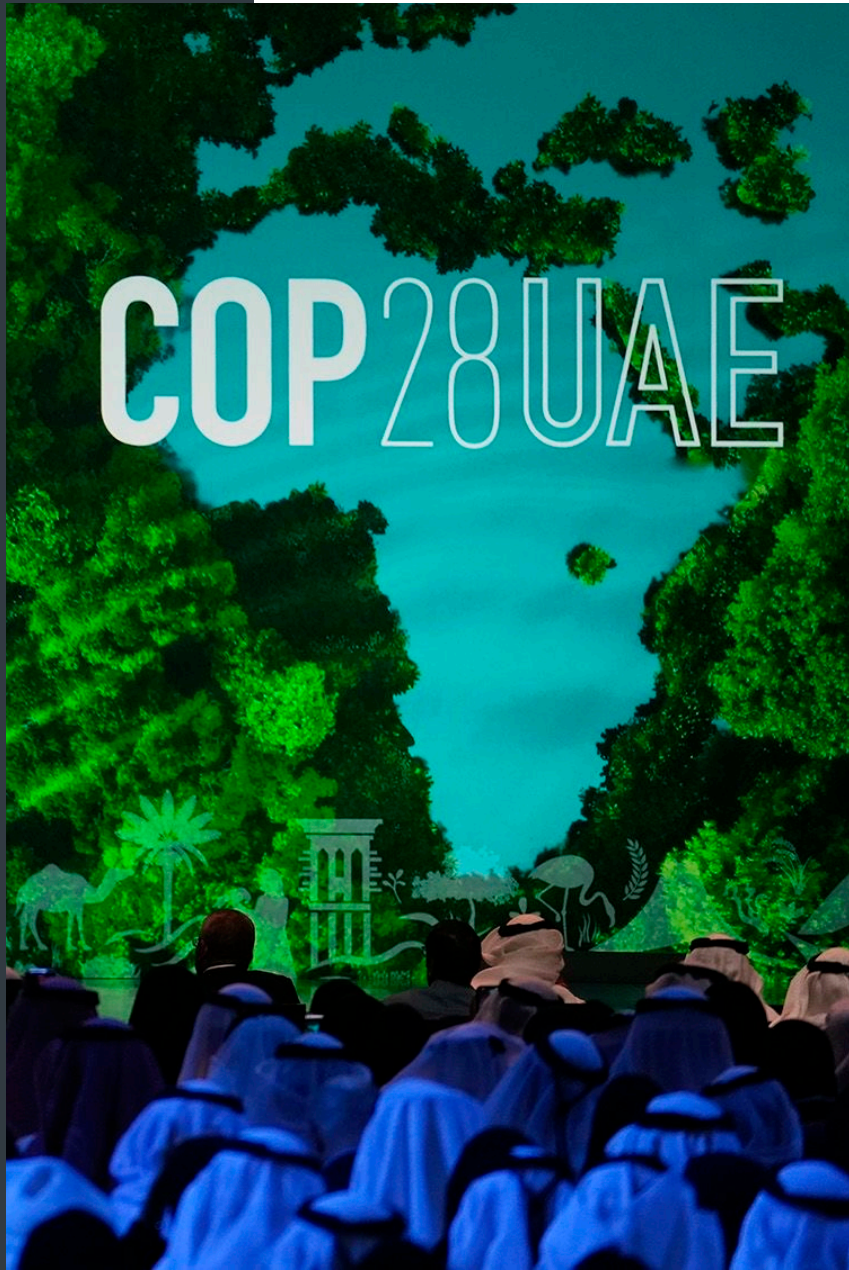
EXECUTIVE SUMMARY

Climate change is the biggest concern for people around the world, according to APCO's inaugural global Climate Action Confidence Tracker, conducted in partnership with the World Business Council for Sustainable Development (WBCSD). People see business as playing a key role in solving the climate challenge through scaling and innovating technology solutions. However, while seven in 10 people agree that climate change is important, they find it hard to tell who is doing anything about it or who is leading on action. The global public is also split on whether to use incentives to reward good climate-related behavior or to use punishment for companies who don't adhere to emissions regulations. After people receive an explanation, they see the concept of encouraging companies to invest now and build products and services to avoid future emissions as a good policy. However, fewer than half of the public understands climate change terminology. The survey reveals an enormous opportunity for governments and companies to bring the public with them as they reconfigure and better align their economies and business models to meet key climate-change targets. With COP28, governments and corporations are at a time-sensitive, critical moment, with the chance to reframe how they talk about scaling their climate actions to focus more on science-informed innovations, investments, and solutions and to be more inclusive of nonexperts.

INTRODUCTION

The United Nations defines climate change as long-term shifts in temperature and weather patterns.[1] Natural phenomena, such as volcanic eruptions, tectonic shifts, or fluctuations in solar radiation, can cause these shifts. But since the mid-19th century, roughly the time of the Second Industrial Revolution, it is human activity that has been the primary driver of climate change, most scientists agree.

Energy production, industry, transportation, and other human activities require burning fossil fuels such as coal, oil, and gas. When these substances burn, they release emissions that result in a greenhouse effect, trapping the sun's heat over the earth. Globally, the earth's temperature is increasing faster than at any other point in recorded history.[2] Specifically, global surface temperatures from 2011–2020 increased 1.1 degrees Celsius from the years 1850–1900, according to high-confidence findings from the Intergovernmental Panel on Climate Change (IPCC)[3].

The IPCC also has found that human-caused climate change is affecting weather and climate extremes across the planet. In the past year, record-setting heatwaves have impacted ecosystems and human health in the United States, China, Europe, North Africa, and the Middle East. Severe wildfires scorched Canada, Greece, and Hawaii, displacing communities and causing significant environmental damage. Precipitation patterns have altered, producing unexpected heavy rainfall and floods in the US and Libya, while droughts in Chile and the Horn of Africa have impacted agriculture and water supply.

The IPCC concluded that climate risks are more severe—and are appearing faster—than expected, making it increasingly difficult for the world to adapt to increased global warming. Across the globe, mitigation policies and practices are uneven, with the first global stocktake at COP28 expected to reveal serious gaps between climate action plans and actual implementation. Additionally, financial investment appears to be falling short of the levels needed to achieve climate goals across all sectors and regions.
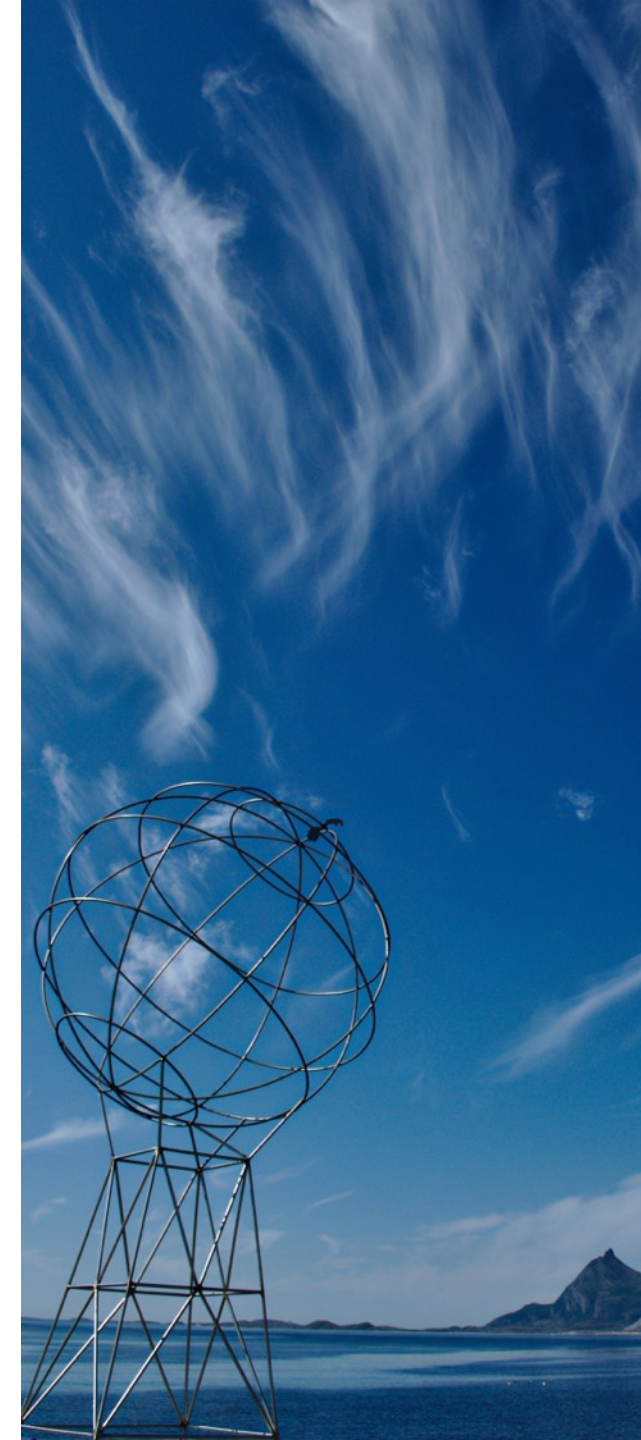
In a comprehensive, rigorous online survey that spanned 24,300 adults in 39 countries, APCO set out to investigate where individuals around the world believe we stand on progress toward climate goals, the contributions of different actors to the goals, and the importance of climate communication in building support for further action. We hope that our work builds on existing valuable research and fills any gaps regarding public perception of our global progress.

What emerges is a sense of cautious optimism that the world can reach net zero targets. While decarbonization and emissions reduction remain important factors, people believe in the potential of technology to be part of the solution in accelerating progress. At the same time, the global public sees a range of challenges hindering progress: a need for governments and businesses to do more individually and to act together, uncertain views on the balance between punitive and incentivized policy approaches, and a need for better communication around climate efforts. The survey also reveals a need to cut through complex terminology and convey what is being done or planned to tackle the problem. Our results confirm that the global public is increasingly convinced of the reality of climate change and the urgency of the need to tackle it.

---

[1] https://www.un.org/en/climatechange/what-is-climate-change
[2] https://wmo.int/media/news/2020-was-one-of-three-warmest-years-record
[3] https://www.ipcc.ch/report/sixth-assessment-report-cycle/

The task now is for leaders to set and articulate the route to achieving climate goals. Our results also show that doing so will build a groundswell of support from citizens and employees for the bold decisions governments and employers need to take.

Governments around the world are tightening the regulatory net and enacting punitive measures for corporations that don't follow regulations. In June 2023, the International Sustainability Standards Board (ISSB) published two standards—IFRS S1 and IFRS S2 on general principles and climate-related risk—that start to provide a high-quality, comprehensive global baseline of sustainability disclosures once adopted by countries[4]. In addition, the European Union (EU) Corporate Sustainability Reporting Directive (CSRD) will require companies operating in the EU to disclose information on the risks and opportunities arising from social and environmental issues and the impact of their activities on people and the environment[5]. Meanwhile, in California, the Climate Corporate Data Accountability Act will establish the first industry-agnostic US regulation to mandate the corporate reporting of greenhouse gas emissions in the United States[6].

Indeed, within one week in September 2023, California passed legislation intended to force any public or private business operating in California to make climate-related disclosures, while the state government filed a lawsuit that accused five major oil companies of lying about the dangers of climate change.

Generally, such climate disclosure regulations aim to provide the public with clear and transparent information regarding the actions of companies to address the impacts of climate change on their operations, which affect a company's long-term value. Mandatory disclosures thus help the public to decide how to channel their investments. Fines for noncompliance, while punitive, are minor compared to the effect of market forces.

But, even as global standards become stricter, the public is equally supportive of government-led incentives that encourage companies to invest and act as a complement to policies that punish companies for failing to do so.

On the eve of COP28, the public seeks clarity about who is doing what. An objective framework for measuring progress in combination with clear communication emerges as a critical element to corralling a positive global response. An informed public is notably more likely to support trade-offs that result in increased government and employer spending to address climate change.

This survey's findings help support and shape WBCSD's activities to strengthen climate-related corporate performance and accountability systems.

As a company in the business of advising corporations, governments, and others on how to build strategies and communicate them effectively, APCO also plans to continue to work to understand the perception of the global public in this area. We hope to use these insights to better our own understanding and help us contribute to broader discussion on climate: the major global issue of our times.

[4] https://www.ifrs.org/news-and-events/news/2023/06/issb-issues-ifrs-s1-ifrs-s2/
[5] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32022L2464
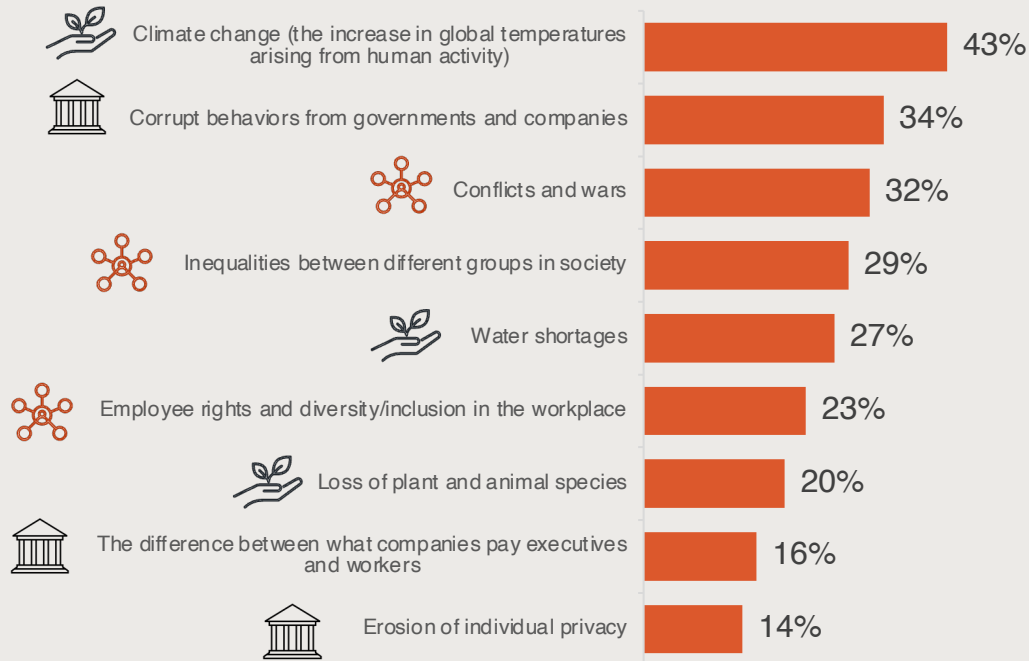[6] https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202320240SB253

SECTION A:

A WORLD OF MANY ISSUES

Our survey confirms that climate change is the dominant issue for people around the world—across continents, age groups, and employees of companies in diverse sectors and sizes. When presented with a list of global-scale issues, more than four in 10 people selected climate change as the issue they care most about.
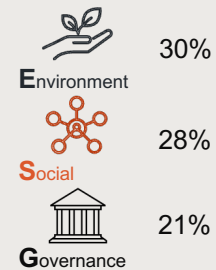
The results challenge the notion that climate change is predominantly a "next-generation" issue.[7] In fact, concern about climate change runs even more deeply among citizens aged 26 and over than it does for those 25 and under. Nearly half of older people (48%) list it among their top concerns.

Global Issues Most Cared About

Percent Selecting Issue as the One They Care the Most About (Max. 3)

Issue	Percent
Climate change (the increase in global temperatures arising from human activity)	43%
Corrupt behaviors from governments and companies	34%
Conflicts and wars	32%
Inequalities between different groups in society	29%
Water shortages	27%
Employee rights and diversity/inclusion in the workplace	23%
Loss of plant and animal species	20%
The difference between what companies pay executives and workers	16%
Erosion of individual privacy	14%

Average Percent for ESG Items

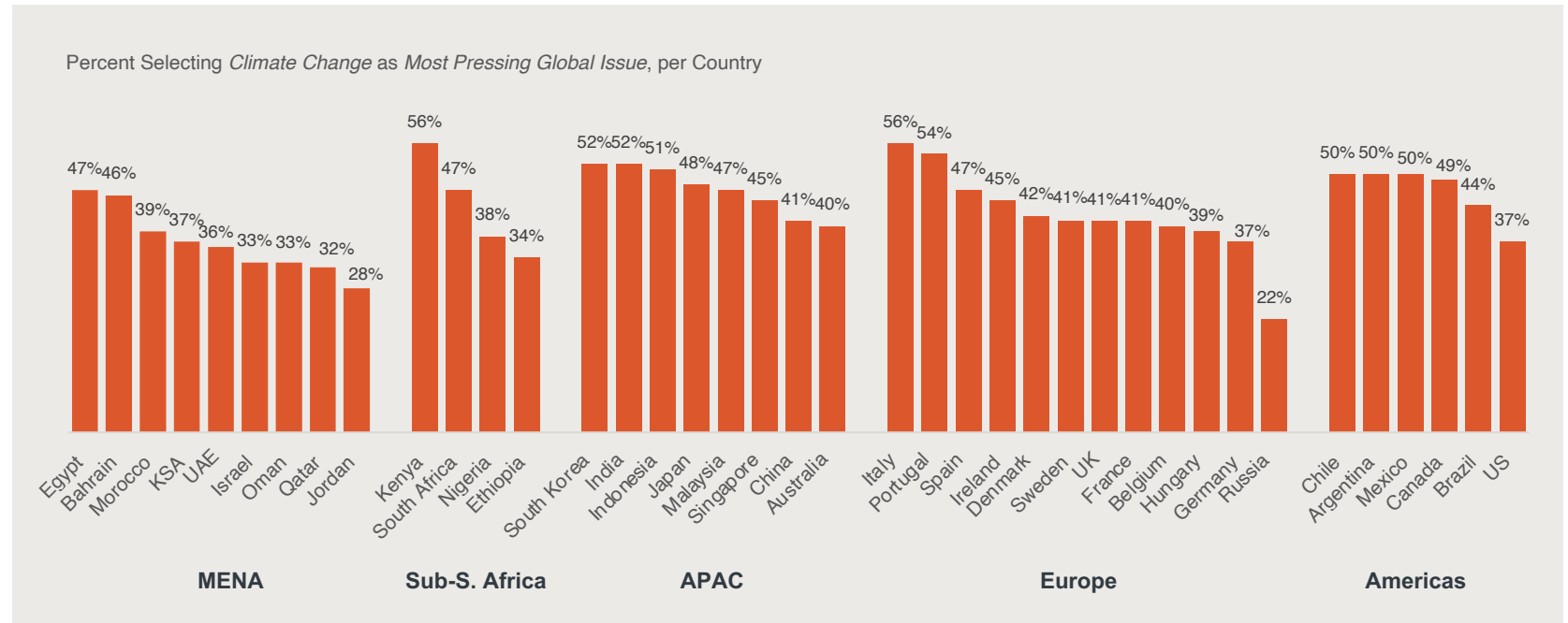| Category	Percent
Environment	30%
Social	28%
Governance	21%

Base: 24,300 online adults aged 18+ across 39 countries.

Concern over climate change is relatively consistent across countries and regions, though with some variation. Countries that demonstrate a significantly higher level of concern when compared to the global average (43%) include Kenya (56%), Italy (56%), Portugal (54%), and several countries in the Asia-Pacific region and the Americas. Lower-concern outliers include Jordan (28%) and Russia (22%). Countries in the Middle East/North Africa region overall expressed the lowest level of concern when compared to other regions surveyed: Sub-Saharan Africa, the Asia-Pacific region, Europe, and the Americas.

The survey's list of "global issues most cared about" presented several consequences of climate change. Interestingly, people expressed significantly lower levels of concern about water shortages (27%) and loss of plant and animal species (20%) when compared to climate change overall (43%). These results suggest a need not only to communicate the reality of climate change itself but also how the effects of climate change interconnect with nature. People don't seem to be connecting the seriousness of climate change with its wider real-world effects on our environment.

Percent Selecting *Climate Change* as *Most Pressing Global Issue*, per Country

MENA — Egypt 47%, Bahrain 46%, Morocco 39%, KSA 37%, UAE 36%, Israel 33%, Oman 33%, Qatar 32%, Jordan 28%

Sub-S. Africa — Kenya 56%, South Africa 47%, Nigeria 38%, Ethiopia 34%

APAC — South Korea 52%, India 52%, Indonesia 51%, Japan 48%, Malaysia 47%, Singapore 45%, China 41%, Australia 40%

Europe — Italy 56%, Portugal 54%, Spain 47%, Ireland 45%, Denmark 42%, Sweden 41%, UK 41%, France 41%, Belgium 40%, Hungary 39%, Germany 37%, Russia 22%

Americas — Chile 50%, Argentina 50%, Mexico 50%, Canada 49%, Brazil 44%, US 37%

[7] Many contemporary surveys acknowledge the concern among young people about climate change. For example, a 2021 survey of 10,000 people aged 16–25 published in *The Lancet Planetary Health* was the first large-scale investigation of climate anxiety in children and young people globally and its relationship with perceived government response. Respondents across all 10 countries surveyed were *worried about climate* change (84% were at least *moderately worried*). However, like many similar surveys in the years that followed, the survey did not address climate anxiety among other age groups nor compare concern among age groups. Additional information regarding views from an advanced industrialized economy can be found in a 2023 Cardiff University study published in *Communications Earth & Environment*.

SECTION B:

CLIMATE CONFIDENCE

In perhaps our most surprising finding, the survey reveals a level of optimism among people that the world will achieve climate-related targets. Across our survey, 55 percent say they feel reaching global net zero targets by 2050 is definitely or probably achievable.

This level of confidence varies widely among regions. Climate change and the resulting catastrophic weather events disproportionately affect the most vulnerable.[8] Yet certain regions within the developing world have emerged as the most optimistic on net zero targets. People in Sub-Saharan Africa (67%) and the Middle East/North Africa region (64%) are most optimistic about the achievability of global targets.
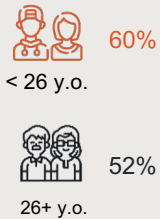
Perceived Achievability of Net Zero Target by 2050 Globally

Total Not Achievable:
40%

30%

5%

20%

20%

25%
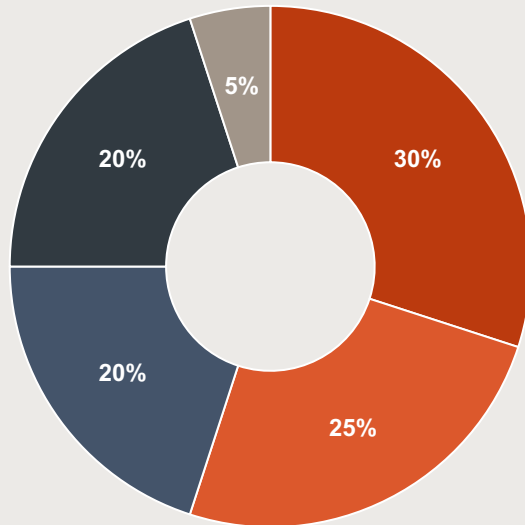
Total Achievable:
55%

Total Achievable by Age

60%
< 26 y.o.

52%
26+ y.o.

■ Definitely Achievable ■ Probably Achievable ■ Probably not Achievable ■ Definitely not Achievable ■ Don't Know

Base: 21,300 online adults aged 18+ across 34 countries
*Qatar, Egypt, Jordan, Morocco, and Kenya did not receive the question as they do not currently have net zero targets established at the country level.
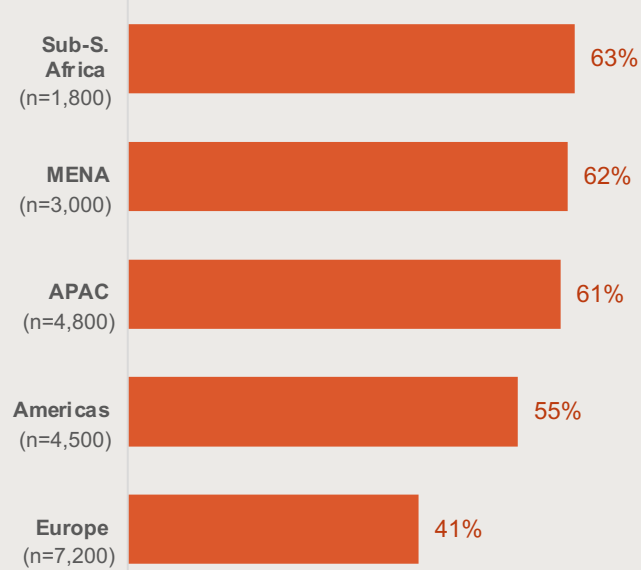**Net zero status of every country is taken from the Net Zero Tracker's mid-July 2023 available data (https://zerotracker.net/#data-explorer)

8 https://www.un.org/ohrlls/news/frontline-climate-crisis-worlds-most-vulnerable-nations-suffer-disproportionately

By contrast, Europe is the only region in which fewer than half of people believe in the achievability of global net zero targets. Only 36 percent of the European public answer that global net zero targets are probably or definitely achievable.
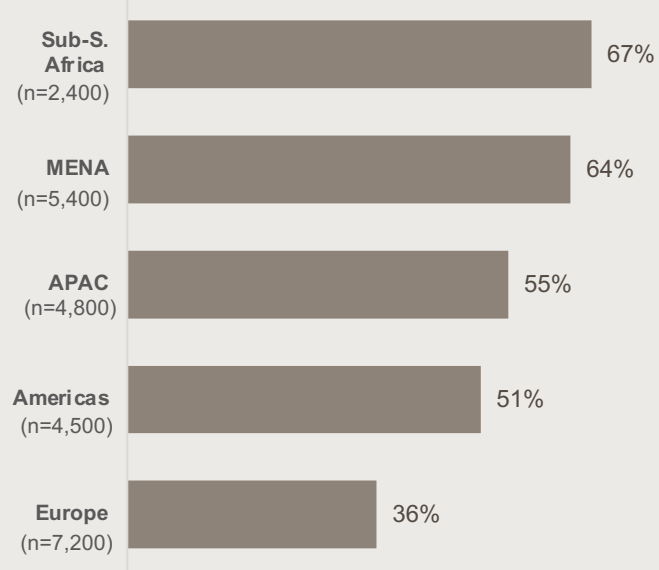
Additionally, the survey asked people in countries that had articulated to varying degrees a national net zero target about their confidence in their own countries' ability to meet these goals. People who show optimism about global targets also tend to be positive about the prospect of their own country reaching its goal.

Perceived Achievability of Net Zero Targets*

**Total Achievable - Country Targets**

Region	Value
Sub-S. Africa (n=1,800)	63%
MENA (n=3,000)	62%
APAC (n=4,800)	61%
Americas (n=4,500)	55%
Europe (n=7,200)	41%

Total Achievable - Global Targets

Region	Value
Sub-S. Africa (n=2,400)	67%
MENA (n=5,400)	64%
APAC (n=4,800)	55%
Americas (n=4,500)	51%
Europe (n=7,200)	36%

Base for global targets: 24,300 online adults aged 18+ across 39 countries
Base for country targets: 21,300 online adults aged 18+ across 34 countries
*Qatar, Egypt, Jordan, Morocco, and Kenya did not receive the question as they do not currently have net zero targets established at the country level.
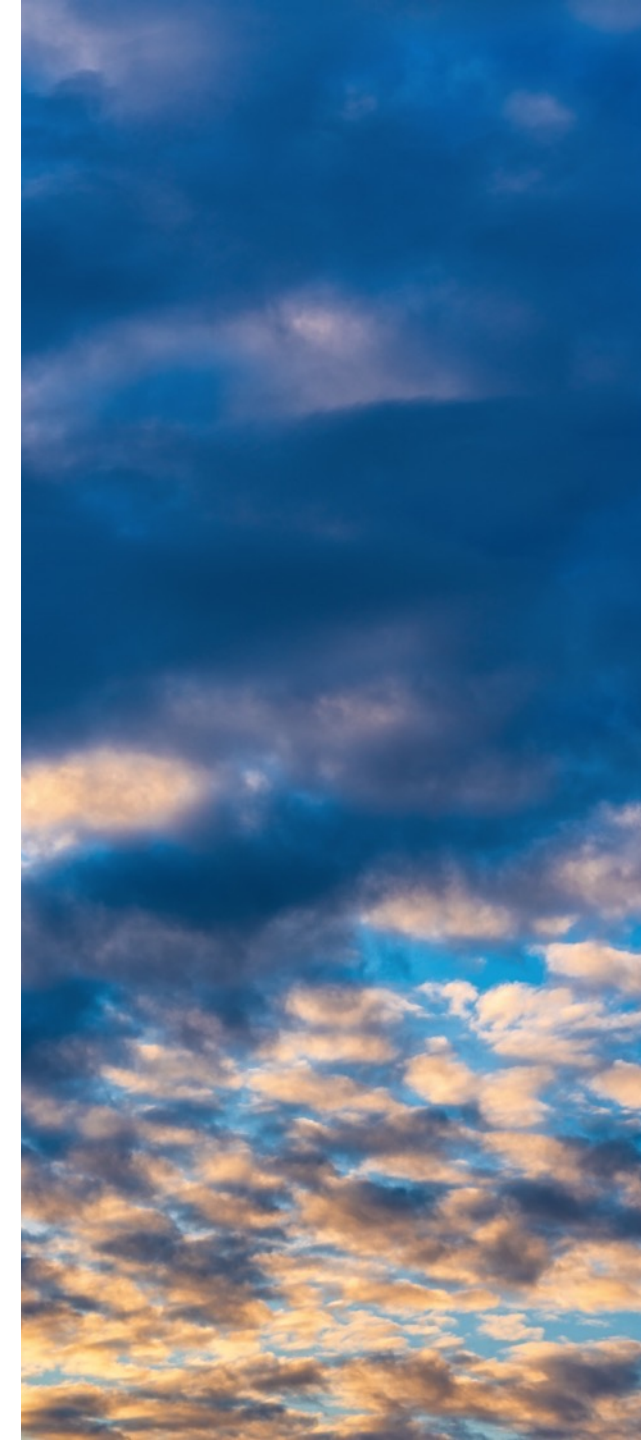
The survey suggests a desire among the public for enhanced innovation investment in—and dissemination of—climate-friendly technology solutions, especially among people from emerging markets and developing economies. This desire is evident in countries such as Nigeria (71%), Brazil and Indonesia (70%), China, India, Ethiopia, and Kenya (68%), Jordan and Malaysia (67%), Egypt (66%), Singapore and South Africa (65%), Argentina and Russia (64%), Mexico (62%), and Chile (61%). Globally, six in 10 people believe that climate change is a problem we can solve with technology, even if the technologies we need haven't been fully developed yet.

A useful framework for considering the positive impact of technology is that of avoided emissions—that is, those that exist outside of an organization's own value chain. For example, one way of understanding the environmental impact of fuel-efficient tires includes both the manufacturing emissions in making the tires and the savings in emissions once they are fitted on vehicles. Our survey shows that a large majority (73%) consider avoided emissions a good framework for considering companies' impact on the climate. At the same time, a similar share (76%) also say they would only trust claims about the enabling impact of avoided emissions if there were a common, standard way for companies to measure.

Overall, although most of the global public feels confident about the achievability of 2050 targets, it's a slim majority. The survey reveals that 40 percent of people express doubt. More work thus needs to be done to generate even greater buy-in and confidence, especially in certain regions of the world. This includes enhancing the way governments and companies communicate about their actions.
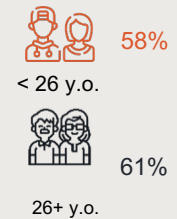
> **Climate change is a problem we can solve with technology, even if the technologies we need haven't been fully developed yet."**

Total Disagree:
33%
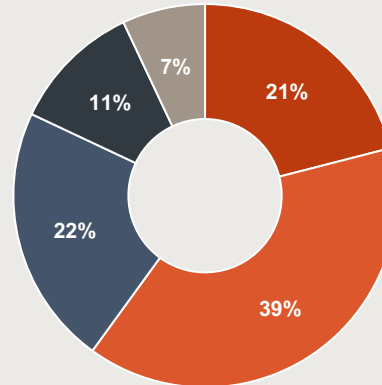
Total Agree:
60%

21%

39%

22%

11%

7%

Total Agree by Age

58%
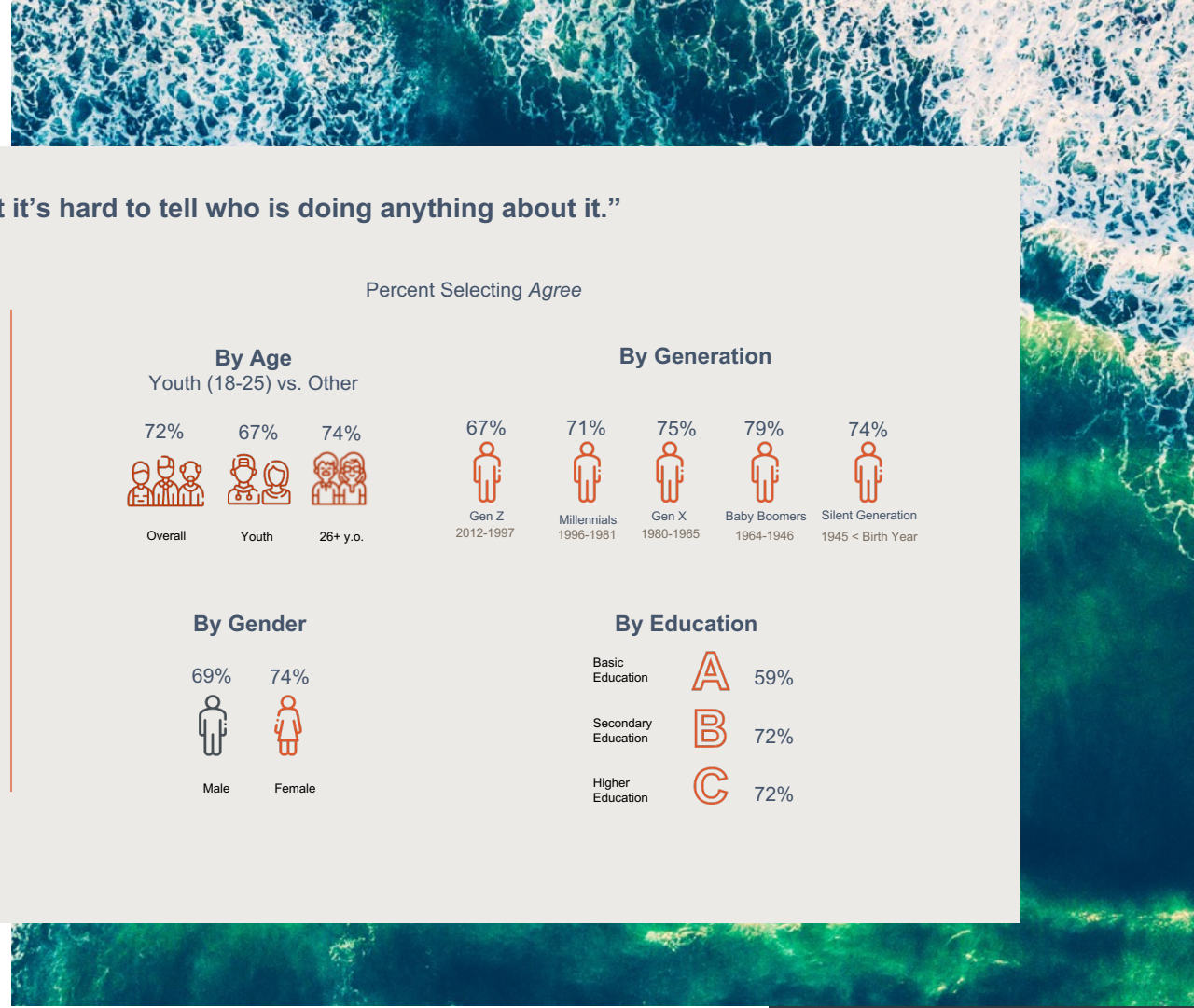< 26 y.o.

61%
26+ y.o.

■ Strongly Agree   ■ Somewhat Agree   ■ Somewhat Disagree   ■ Strongly Disagree   ■ Have no opinion

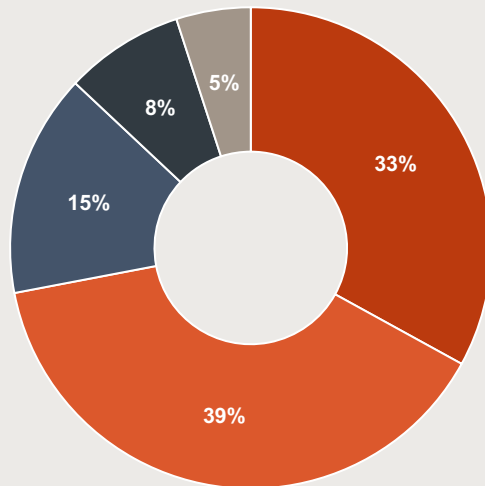Base: 24,300 online adults aged 18+ across 39 countries

SECTION C:

CLIMATE COMMUNICATION

People from around the globe overwhelmingly agree that climate change is important, but they simultaneously are sending another clear message: it's hard to tell who is doing anything about it. Regardless of age, gender, level of education, or region of the world, people feel ill-informed about what climate actors are actually doing.
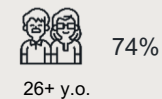
"Everyone says climate change is important, but it's hard to tell who is doing anything about it."

Total Disagree:
23%

Total Agree:
72%

33%

39%

15%

8%

5%

Total Agree by Age

67%
< 26 y.o.

74%
26+ y.o.

■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree ■ Have No Opinion

Percent Selecting *Agree*

By Age
Youth (18-25) vs. Other

72%
Overall

67%
Youth

74%
26+ y.o.

By Generation

67%
Gen Z
2012-1997

71%
Millennials
1996-1981

75%
Gen X
1980-1965

79%
Baby Boomers
1964-1946

74%
Silent Generation
1945 < Birth Year

By Gender

69%
Male

74%
Female

By Education

Basic Education   A   59%

Secondary Education   B   72%

Higher Education   C   72%

Base: 24,300 online adults aged 18+ across 39 countries

The public seeks greater clarity on the actions of corporations and objective ways to track progress. Far from feeling "climate fatigue," nearly six in 10 people agree that they do not hear enough from organizations or prominent individuals talking about climate change. They see international organizations (53%) and nongovernmental organizations (52%) as doing enough. But there's a sense of disconnect between the public and other actors.

"I don't hear enough organizations and prominent individuals talking about climate change."

Total Disagree: 35%

Total Agree: 59%

- 22%
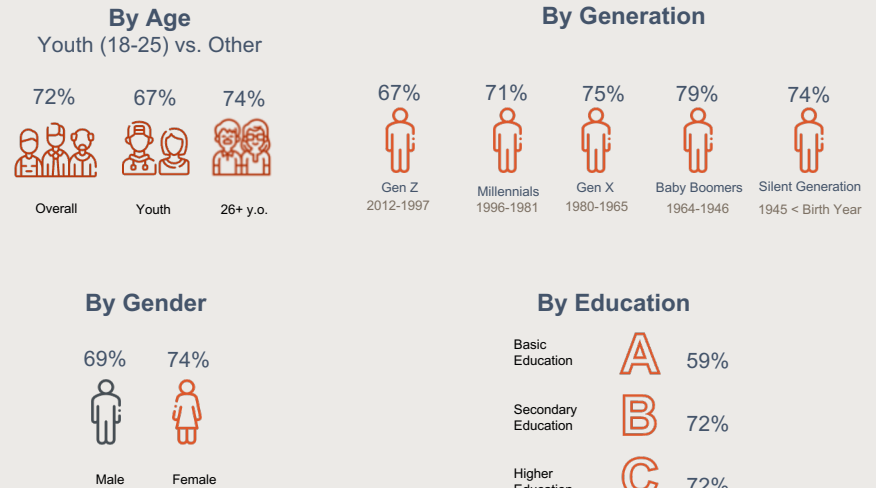- 37%
- 23%
- 12%
- 6%

Total Agree by Age

56% < 26 y.o.

60% 26+ y.o.

- Strongly Agree
- Somewhat Agree
- Somewhat Disagree
- Strongly Disagree
- Have No Opinion
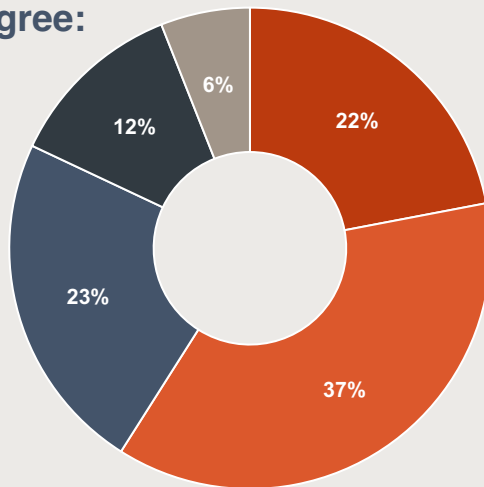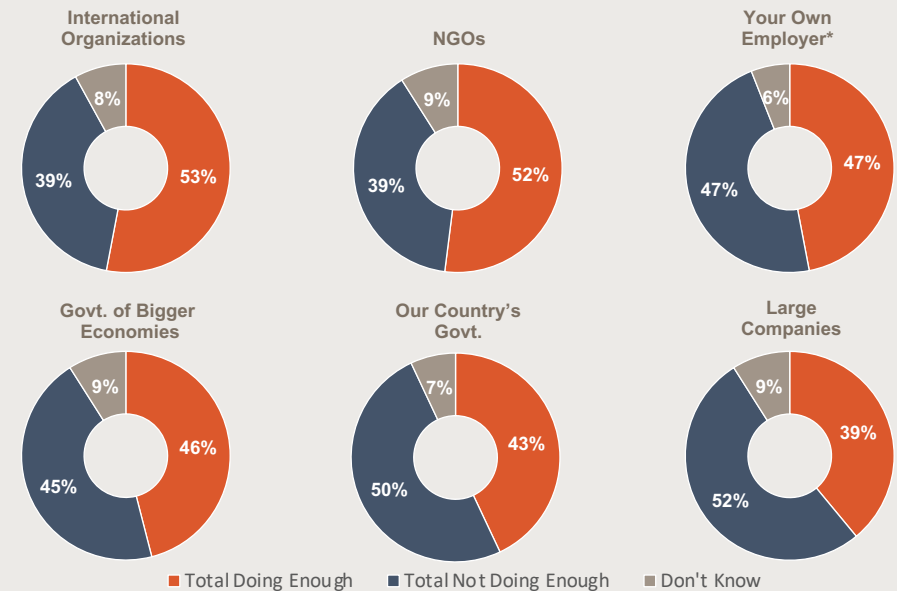
Base: 24,300 online adults aged 18+ across 39 countries

Sufficiency of Actions by Various Parties Toward 2050 Net Zero Target

International Organizations
- 8%
- 39%
- 53%

NGOs
- 9%
- 39%
- 52%

Your Own Employer*
- 6%
- 47%
- 47%

Govt. of Bigger Economies
- 9%
- 45%
- 46%

Our Country's Govt.
- 7%
- 50%
- 43%

Large Companies
- 9%
- 52%
- 39%

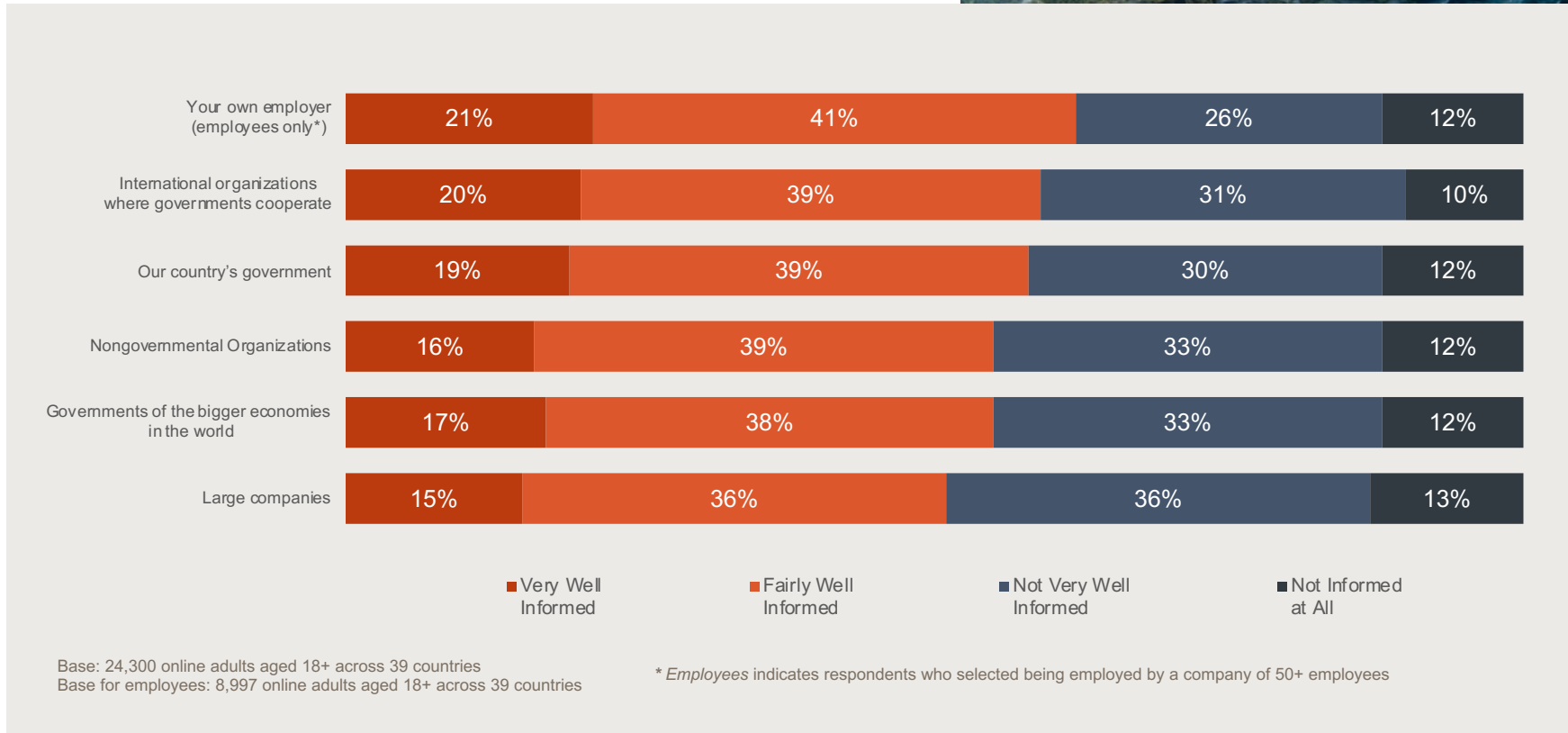- Total Doing Enough
- Total Not Doing Enough
- Don't Know

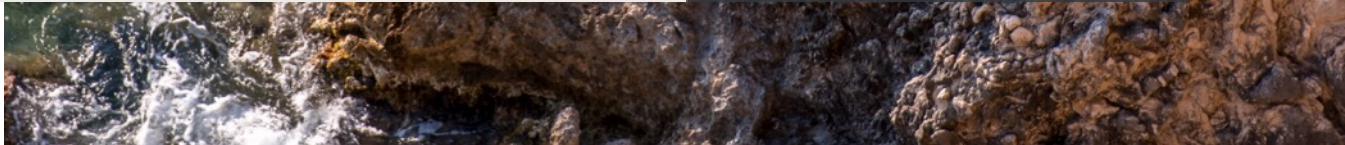Base: 24,300 online adults aged 18+ across 39 countries
*Base: 8,997 online employees aged 18+ across 39 countries

Total Doing Enough is the sum of responses indicating *Doing a Lot* and *Doing the Most They Can*
Total Not Doing Enough is the sum of responses indicating *Doing a Little* and *Not Doing Anything*

The public says only 39 percent of large companies and 43 percent of their own governments are doing enough to progress toward 2050 net zero targets. The public is calling on governments and large companies to do more. Simultaneously, a significant portion of the public feels uninformed about what these exact actors—large companies and the governments of the bigger economies—are doing to address climate change.

	Very Well Informed	Fairly Well Informed	Not Very Well Informed	Not Informed at All
Your own employer (employees only*)	21%	41%	26%	12%
International organizations where governments cooperate	20%	39%	31%	10%
Our country's government	19%	39%	30%	12%
Nongovernmental Organizations	16%	39%	33%	12%
Governments of the bigger economies in the world	17%	38%	33%	12%
Large companies	15%	36%	36%	13%

■ Very Well Informed   ■ Fairly Well Informed   ■ Not Very Well Informed   ■ Not Informed at All

Base: 24,300 online adults aged 18+ across 39 countries
Base for employees: 8,997 online adults aged 18+ across 39 countries

* *Employees* indicates respondents who selected being employed by a company of 50+ employees

"

Everyone says climate change is important, but it's hard to tell who is doing anything about it."

Although a slim majority (51%) agree they hear a consistent message from their government, more than four in 10 feel that they do not. Additionally, consistency of messaging among government, corporations, and other organizations varies considerably by country. In several countries—such as Argentina (27%) and Israel, Italy, and Russia (34%)—only a minority say they hear a consistent message.
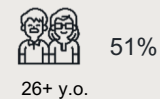
"I hear a consistent message from our government, companies and other organizations in our country about how we are tackling climate change."
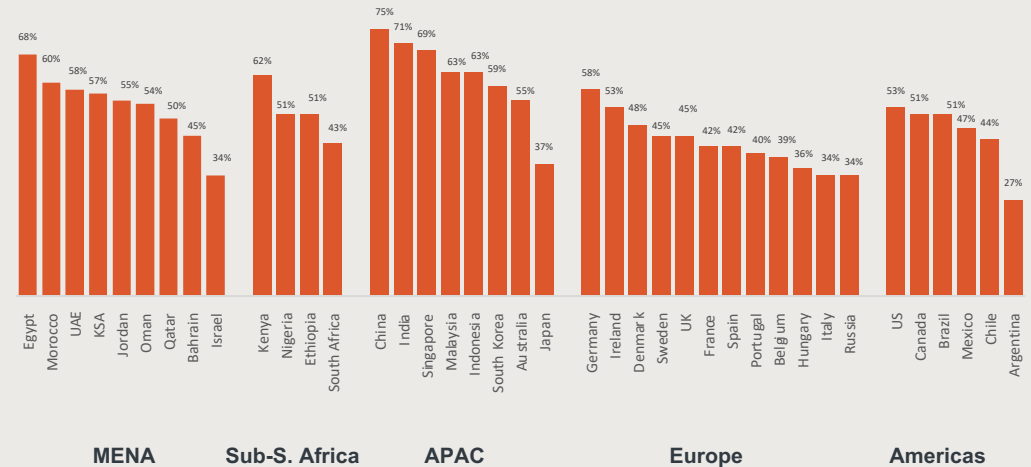
Total Disagree:
42%
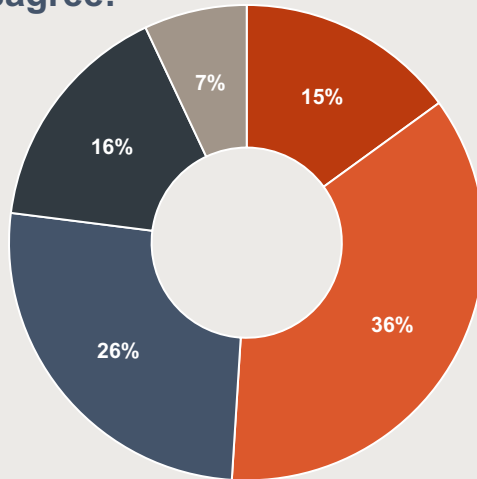
Total Agree:
51%

15%

36%

26%

16%

7%

Total Agree by Age

50%
< 26 y.o.

51%
26+ y.o.

■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree ■ Have no opinion

Base: 24,300 online adults aged 18+ across 39 countries

Agreement to Consistency of Message by Countries
Percent Selecting *Agree*, per Country

Country	%
Egypt	68%
Morocco	60%
UAE	58%
KSA	57%
Jordan	55%
Oman	54%
Qatar	50%
Bahrain	45%
Israel	34%
Kenya	62%
Nigeria	51%
Ethiopia	51%
South Africa	43%
China	75%
India	71%
Singapore	69%
Malaysia	63%
Indonesia	63%
South Korea	59%
Australia	55%
Japan	37%
Germany	58%
Ireland	53%
Denmark	48%
Sweden	45%
UK	45%
France	42%
Spain	42%
Portugal	40%
Belgium	39%
Hungary	36%
Italy	34%
Russia	34%
US	53%
Canada	51%
Brazil	51%
Mexico	47%
Chile	44%
Argentina	27%

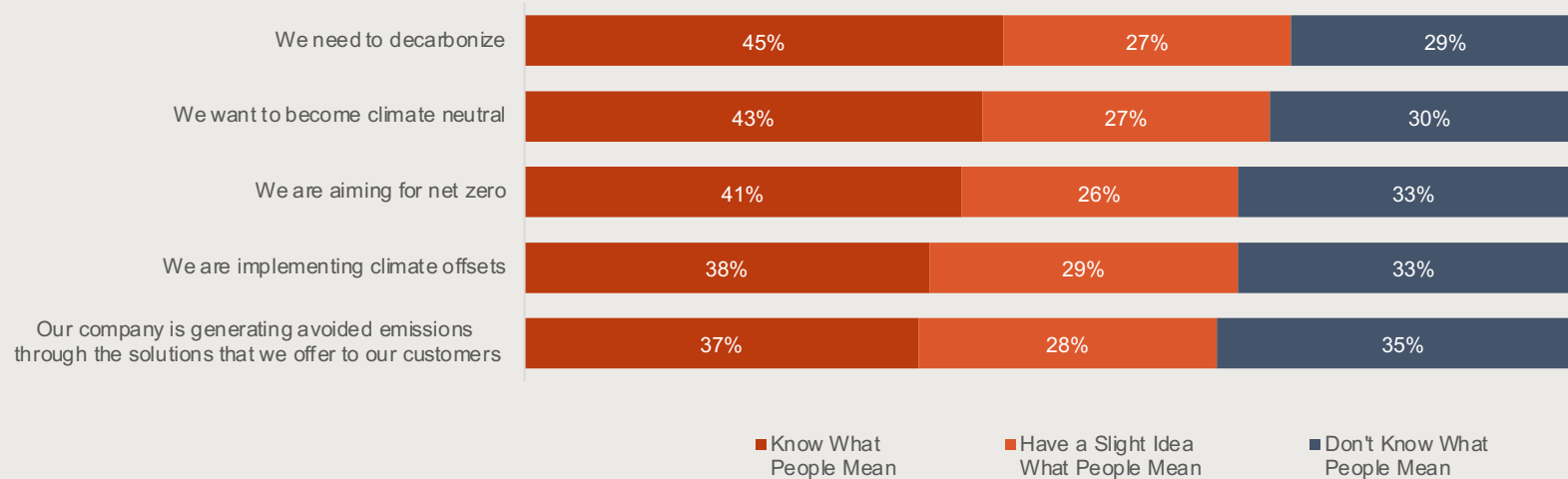**MENA**   **Sub-S. Africa**   **APAC**   **Europe**   **Americas**

Base: 24,300 online adults aged 18+ across 39 countries
Agree is the sum of responses indicating *Strongly Agree* and *Somewhat Agree*

Furthermore, the terminology surrounding climate change is poorly understood by the public, with only 37–45 percent responding that they understood the meaning of common terms used by climate professionals. For example, 35 percent of people indicate they don't know what people mean by a company's statement that it generates avoided emissions through solutions it offers customers. Only fewer than half of people understand common terms such as decarbonize (45%), climate neutral (43%), net zero (41%), and climate offsets (38%).

Percent Understanding of Different Terms

Term	Know What People Mean	Have a Slight Idea What People Mean	Don't Know What People Mean
We need to decarbonize	45%	27%	29%
We want to become climate neutral	43%	27%	30%
We are aiming for net zero	41%	26%	33%
We are implementing climate offsets	38%	29%	33%
Our company is generating avoided emissions through the solutions that we offer to our customers	37%	28%	35%

- ■ Know What People Mean
- ■ Have a Slight Idea What People Mean
- ■ Don't Know What People Mean

Base: 24,300 online adults aged 18+ across 39 countries

"
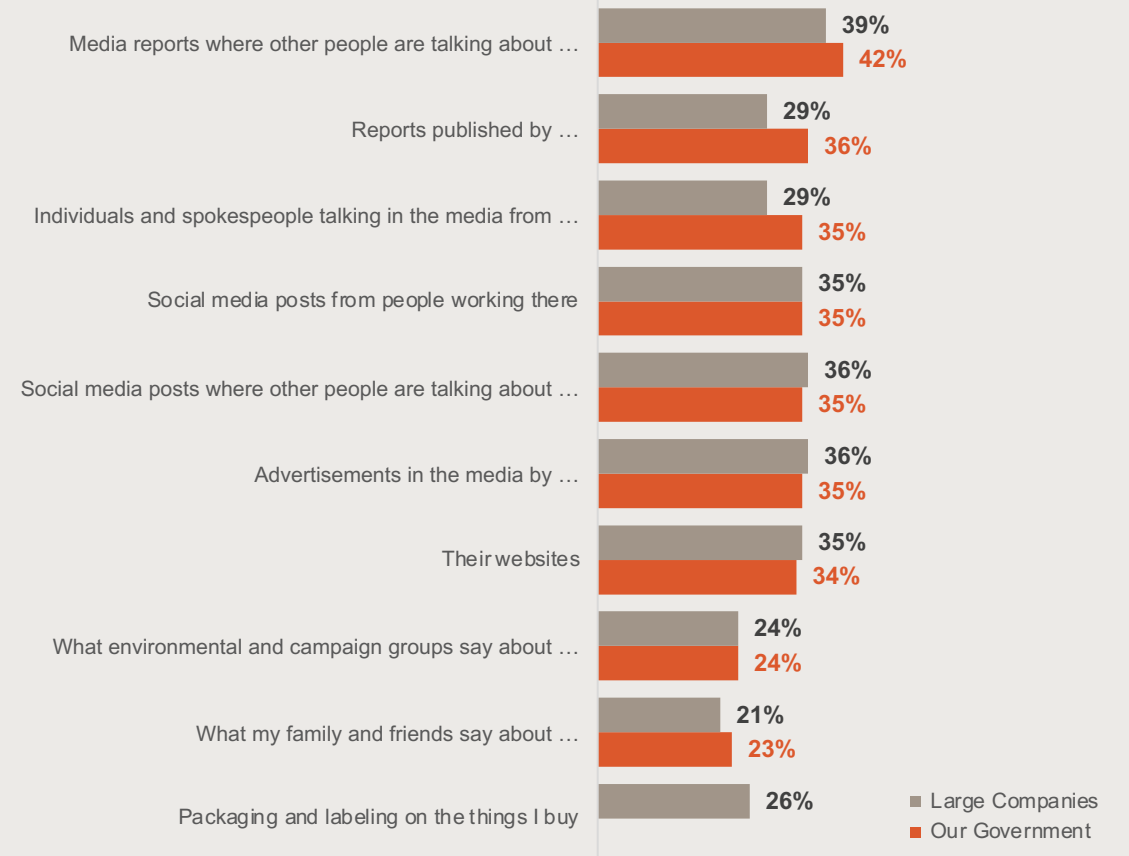I don't hear enough organizations and prominent individuals talking about climate change."
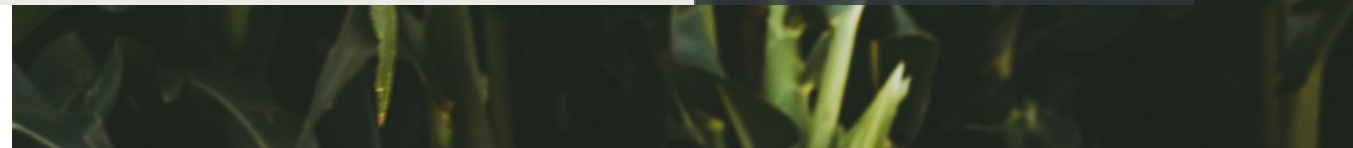
The survey reveals that there are several important channels when it comes to keeping the public informed about climate action. The effectiveness of communicating through these channels varies depending on whether information comes from government or corporate sources. For example, published reports and individual spokespeople are more effective for government communicators than for corporations by about 7 percent. This indicates that companies may be over-reliant on sustainability and climate reporting to communicate their efforts. Only 29 percent of those who feel informed about what large companies are doing on climate say they get this information from company reports.

Source of Information on Climate Change

Percent Selecting the Source of Information, Informed Public*

Source	Large Companies	Our Government
Media reports where other people are talking about …	39%	42%
Reports published by …	29%	36%
Individuals and spokespeople talking in the media from …	29%	35%
Social media posts from people working there	35%	35%
Social media posts where other people are talking about …	36%	35%
Advertisements in the media by …	36%	35%
Their websites	35%	34%
What environmental and campaign groups say about …	24%	24%
What my family and friends say about …	21%	23%
Packaging and labeling on the things I buy	26%	

■ Large Companies
■ Our Government

Base: 5,154 climate-informed (government) online adults aged 18+ across 39 countries

Base: 4,281 climate-informed (companies) online adults aged 18+ across 39 countries

*Informed is the sum of responses indicating Very Well Informed and Fairly Well Informed

Communication channels vary widely in effectiveness when communicating to different generations. People get their information from various sources: traditional media outlets, governmental and corporate reporting, spokespeople, social media, advertisements, the internet, and other channels. One size does not fit all. For instance, informed younger audiences (Gen Z and Millennials, groups born between 1981 and 2012) are about 15 percent more likely to inform themselves about government climate action via social media than are older groups.
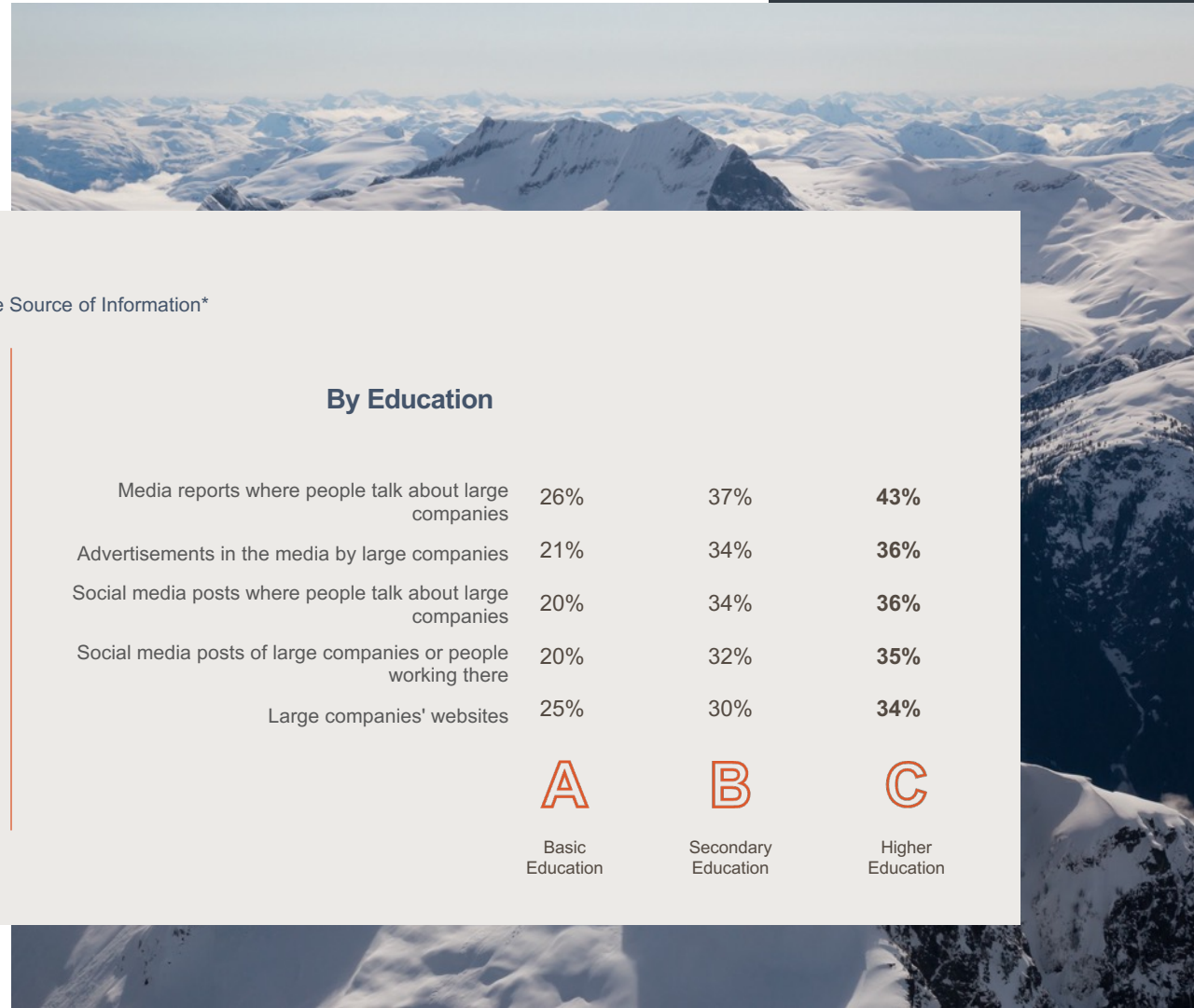
Source of Information on Climate Change

Percent Selecting the Source of Information*

By Generation

	Gen Z 2012-1997	Millennials 1996-1981	Gen X 1980-1965	Baby Boomers 1964-1946	Silent Generation 1945 < Birth Year
	67%	71%	75%	79%	74%
Media reports where people talk about large companies	36%	38%	42%	40%	**49%**
Advertisements in the media by large companies	35%	33%	34%	31%	**43%**
Social media posts where people talk about large companies	36%	**38%**	34%	23%	22%
Social media posts of large companies or people working there	**37%**	36%	30%	20%	17%
Large companies' websites	**33%**	32%	30%	25%	29%

By Education

	Basic Education (A)	Secondary Education (B)	Higher Education (C)
Media reports where people talk about large companies	26%	37%	**43%**
Advertisements in the media by large companies	21%	34%	**36%**
Social media posts where people talk about large companies	20%	34%	**36%**
Social media posts of large companies or people working there	20%	32%	**35%**
Large companies' websites	25%	30%	**34%**

Base: 8,142 online adults aged 18+ across 39 countries
*The differences of the top five sources of information across generations and education are shown

There is a very strong link between an informed public and a supportive one. The segment of the public who indicate they are very well informed or fairly well informed are 30 percent more likely to positively evaluate the sufficiency of their government's actions toward the global 2050 net zero target. Only 25 percent of those who consider themselves not informed say that their national government's actions toward meeting 2050 net zero targets are sufficient. In contrast, 55 percent of informed individuals believe their national government's actions toward meeting these targets are sufficient.

Similar results emerge when it comes to corporations. A company's internal climate communication is very important in generating a positive perception among employees. Employees who feel informed about what their company is doing toward net zero goals are 35 percent more likely to view their employer's climate contributions positively. Only one in four employees who don't feel well informed say their company is doing enough to meet its climate-related targets.

Sufficiency of National Government Actions Toward Global 2050 Net Zero Target

Percent Selecting *Doing Enough**

|	
55%	**25%**
Informed Public	Not Informed Public
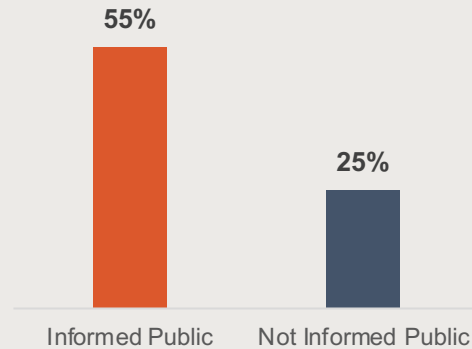
Base: 24,300 online adults aged 18+ across 39 countries
Base *Informed Public*: 14,040 online adults aged 18+ across 39 countries
Base *Not Informed Public*: 10,260 online adults aged 18+ across 39 countries

Informed Public is the sum of responses indicating *Very Well Informed* and *Fairly Well Informed*
Not Informed Public is the sum of responses indicating *Not Very Well Informed* and *Not Informed at All*
Doing Enough is the sum of responses indicating D*oing a Lot* and *Doing the Most they Can*

Perception of Employers' Actions Toward 2050 Net Zero – Seen as Doing Enough?

Percent Selecting Employer is *Doing A Lot* or *The Most They Can* toward Global Net Zero by 2050
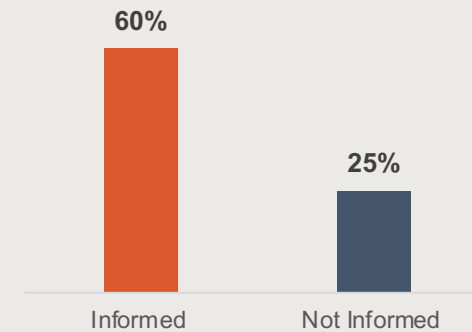
60%	**25%**
Informed	Not Informed

Base: 8,997 online employees aged 18+ across 39 countries

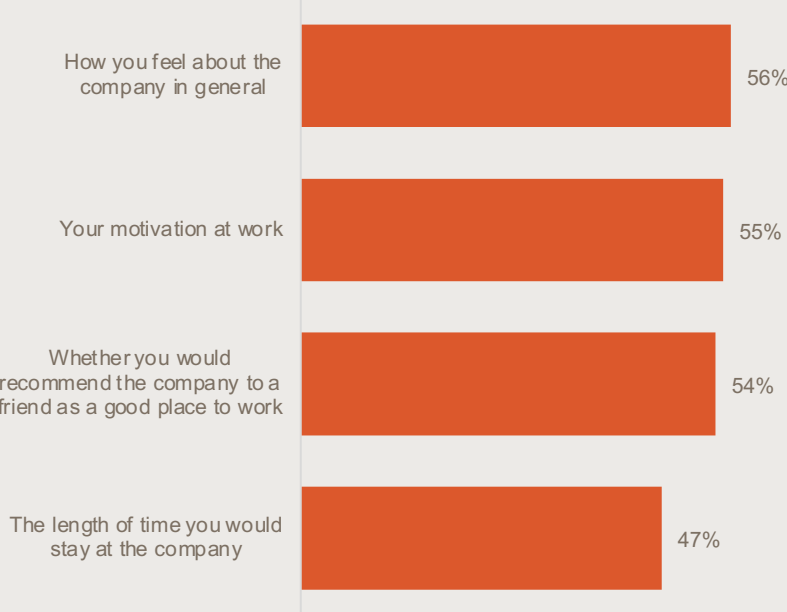*Employee* indicates respondents who selected being employed by a company of 50+ employees
Not Informed is the sum of responses indicating *Not Very Well Informed* and *Not Informed at All*

Among employees who say their employer is not doing enough, a significant share say that enhanced climate commitments would positively impact their general feeling about the company (56%), motivation at work (55%), loyalty (47%), and likelihood of recommending the company to others as a good place to work (54%). This indicates that climate-related initiatives may be critical drivers of employee engagement and satisfaction. It also highlights the potential for companies to enhance employee loyalty and motivation by prioritizing climate action and effectively communicating their commitments and progress in addressing climate-related challenges.

Impact of Climate Commitments on Employee Outcomes

Employees Who Stated Their Employers Are *Not Doing Enough* on Climate
Percent Answering *More Commitment on Climate* Would Positively Impact Outcome

Outcome	Percent
How you feel about the company in general	56%
Your motivation at work	55%
Whether you would recommend the company to a friend as a good place to work	54%
The length of time you would stay at the company	47%

Base: 4,134 online employee adults aged 18+ across 39 countries

* *Employee* indicates respondents who selected being employed by a company of 50+ employees

* *Not Doing Enough* is the sum of responses indicating *Doing a Little* and *Not Doing Anything*

SECTION D:

ACCOUNTABILITY AND TRADE-OFFS

Public opinion on climate-related issues is a complex mix of support for objective measurements, transparency, government incentives, and financial accountability. The public benefits from a common framework—rather than disparate voluntary disclosures or other nonstandard reporting—to provide independent measurement of progress. The fragmentation of frameworks seems to contribute to the public's confusion. Instead, people want assurance that companies are taking real action rather than misrepresenting the environmental impact of a company's operations, or so-called greenwashing.

For example, the public demonstrates strong buy-in to the concept of avoided emissions, but only if there's an objective standard of measurement. Nearly three of four people agree that avoided emissions measures feel like a good way to look at the impact companies have on the climate (73%). However, people indicate a strong need for transparency, standardization, and third-party verification. A significant majority suggests that companies might use the idea of avoided emissions to understate their true level of impact (71%), and 76 percent would trust corporate claims about avoided emissions only if there were a common, standard way that companies measured them.
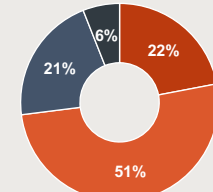
Perceptions about Avoided Emissions

This feels like a good way to look at the impact companies have on the climate
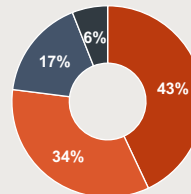
7% | 18% | 55% | 20%
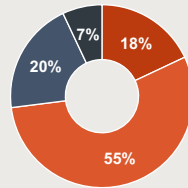
Companies might use this idea to hide or understate the true level of emissions involved in their day-to-day activities

7% | 17% | 54% | 22%
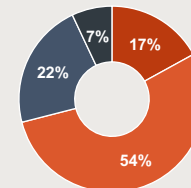
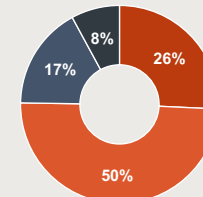*I would trust companies' claims about avoided emissions if these were verified by someone outside the company*

6% | 22% | 51% | 21%

I would like to see labels or ratings on things I buy, to help me understand their avoided emissions

6% | 43% | 34% | 17%

I would only trust claims about avoided emissions if there were a common, standard way companies were measuring these
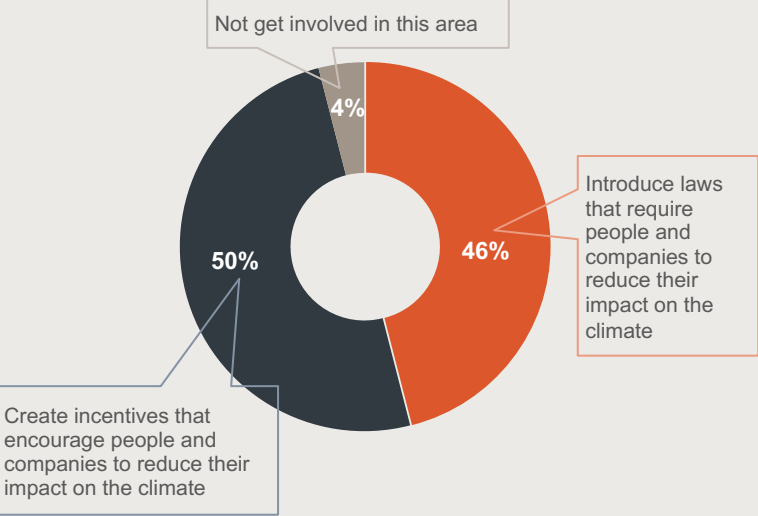
8% | 26% | 50% | 17%

Base: 24,300 online adults aged 18+ across 39 countries

■ Strongly Agree   ■ Somewhat Agree   ■ Somewhat Disagree   ■ Strongly Disagree

Although a majority of people want objective measurements of climate action, they are divided on how to inspire this action in the first place. Fifty percent of the public wants their government to create incentives that encourage companies and individuals to reduce their impact on the climate. By contrast, 46 percent favor government regulation, meaning that the government should introduce laws that require people and companies to reduce their climate impact. Balanced support for both approaches appears across global regions, with Europe slightly favoring incentivization over regulation.

Views on Government Approaches to Climate Action

Not get involved in this area

4%

50%

46%

Introduce laws that require people and companies to reduce their impact on the climate

Create incentives that encourage people and companies to reduce their impact on the climate

	Introduce laws that require impact reductions	Create incentives that encourage impact reductions	Not get involved
Sub-S. Africa (n=2,400)	50%	48%	2%
Americas (n=4,500)	47%	48%	5%
APAC (n=4,800)	45%	51%	4%
MENA (n=5,400)	45%	51%	4%
Europe (n=7,200)	42%	52%	6%

Base: 24,300 online adults (n=600/country, except the US which had n:1,500), aged 18+ across 39 countries
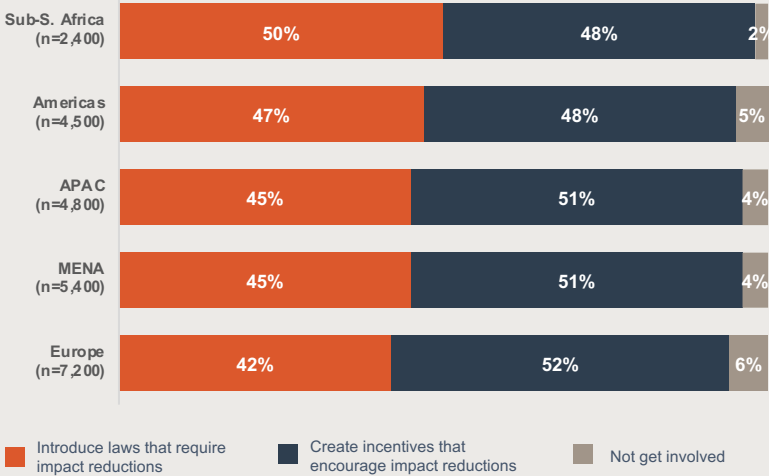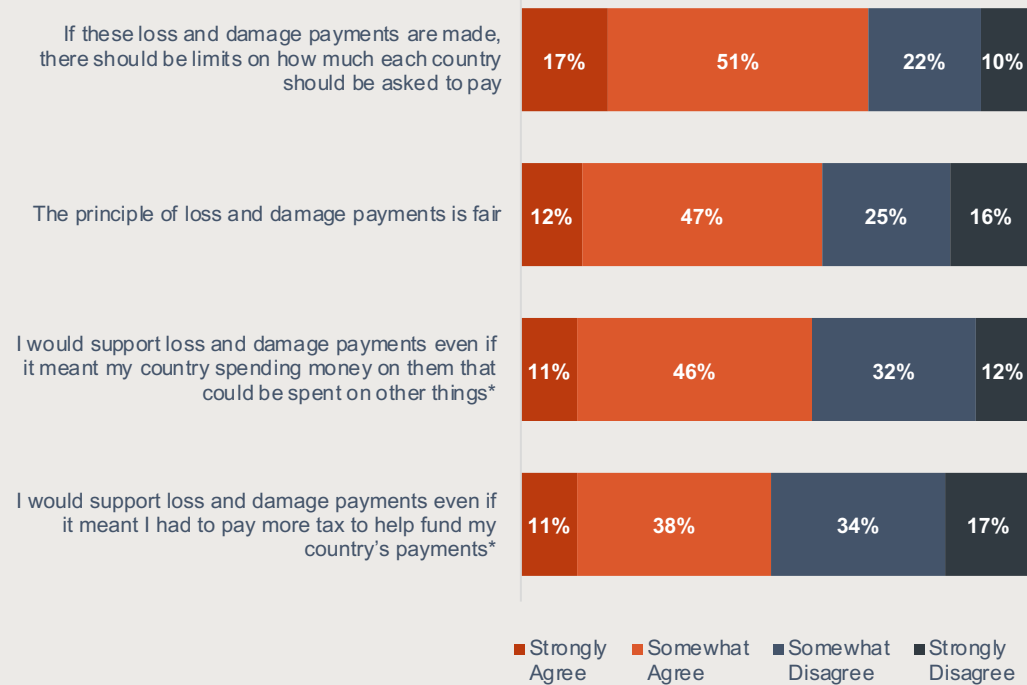
Base: 24,300 online adults aged 18+ across 39 countries

Additionally, a majority of people want to see financial accountability: countries that emit the majority of greenhouse gases should have to pay up. This idea became more concrete at COP27, when UN delegates established the Loss and Damage Fund. The Loss and Damage Fund compensates developing countries that have experienced the brunt of negative consequences from climate change, such as prolonged heat waves or crop failures[9]. While 59 percent say the loss-and-damage principle is fair, nearly seven in 10 people favor capping payments by individual countries.

Perceptions Regarding Loss and Damage Payments

Statement	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
If these loss and damage payments are made, there should be limits on how much each country should be asked to pay	17%	51%	22%	10%
The principle of loss and damage payments is fair	12%	47%	25%	16%
I would support loss and damage payments even if it meant my country spending money on them that could be spent on other things*	11%	46%	32%	12%
I would support loss and damage payments even if it meant I had to pay more tax to help fund my country's payments*	11%	38%	34%	17%

■ Strongly Agree   ■ Somewhat Agree   ■ Somewhat Disagree   ■ Strongly Disagree

Base: 24,300 online adults aged 18+ across 39 countries for the first two statements
*Base for last two statements: 12,300 online adults aged 18+ across potential L&D-paying countries—GDP per capita above $30k—Ireland; Qatar; United States; Denmark; Australia, Sweden, Canada, Israel, United Arab Emirates, Belgium, China, Germany, United Kingdom, Kuwait, France, Italy, Japan, South Korea, Saudi Arabia, Bahrain
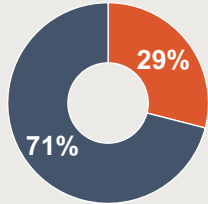
9 https://unfccc.int/news/cop27-reaches-breakthrough-agreement-on-new-loss-and-damage-fund-for-vulnerable-countries

The survey also attempted to dig beyond ascertaining public support for climate-related policies in a vacuum by presenting people with a range of hypothetical policy trade-off scenarios. Clearly, real-life policymaking involves difficult decisions in which governments must reallocate resources to invest in climate policy.
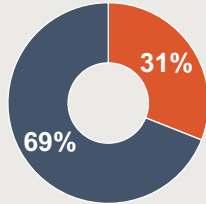
The survey shows that despite strong support for climate investments, the public does not support all types of trade-offs in government spending. When presented with a list of potential trade-off scenarios, the public shows the least support for reduced spending on healthcare (29%). On the other hand, public support for increased spending on climate-related initiatives is highest when it involves a trade-off with defense spending (47%).

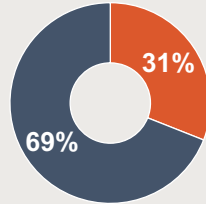## Support for Government Climate Spending Trade-Offs

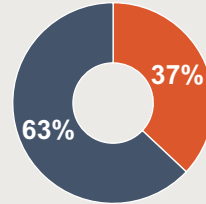|			
Spend Less on Healthcare	Spend Less on Retired/Disabled	Spend Less on Education	Increase National Debt
29% / 71%	31% / 69%	31% / 69%	37% / 63%
Pay More Tax	Increase Energy Costs	Spend Less on Infrastructure	Spend Less on Defense
42% / 58%	45% / 55%	45% / 55%	47% / 53%
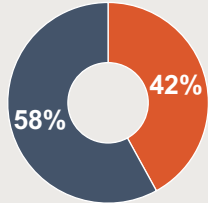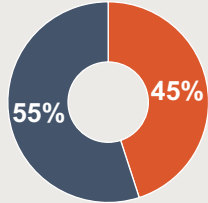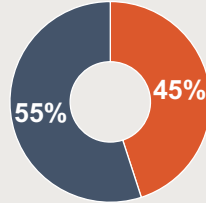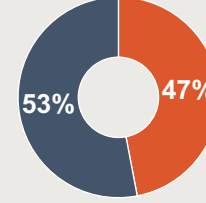
Base: 24,300 online adults aged 18+ across 39 countries
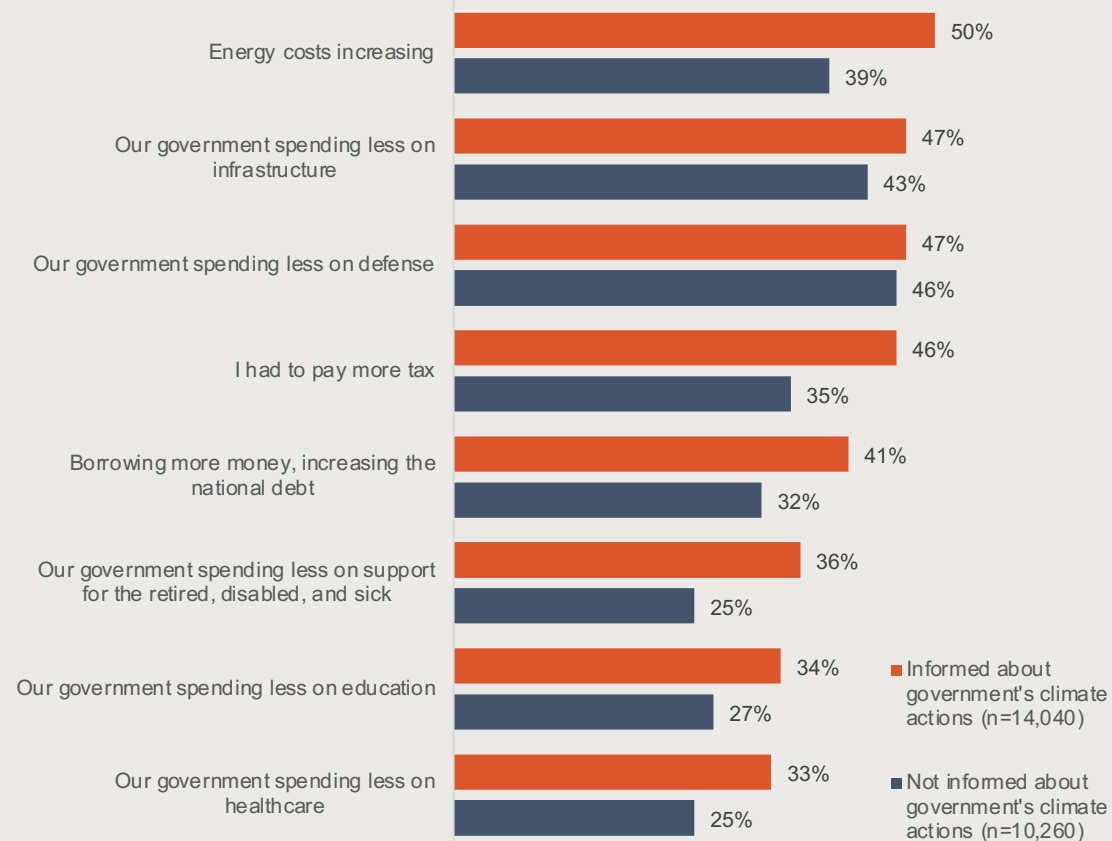
■ Support   ■ Oppose

However, information tends to fuel support for trade-offs. Just as an informed public demonstrates a higher positive perception of their government or employer, they also show greater support for climate spending over those who don't consider themselves informed. In every trade-off scenario, informed people—whether evaluating spending by their government or employer—indicated greater support than those not informed. For example, the proportion of people willing to pay more tax to fund climate investments increases by 11 percent for those who feel informed about the government's actions. Similarly, the informed public is 11 percent more supportive than those not informed when paying increased energy costs or decreasing government spending to support the retired, disabled, and sick.

Support for Government Climate Spending Trade-Offs

Informed vs. *Not Informed* about Government's Climate Actions

Trade-off scenario	Informed	Not informed
Energy costs increasing	50%	39%
Our government spending less on infrastructure	47%	43%
Our government spending less on defense	47%	46%
I had to pay more tax	46%	35%
Borrowing more money, increasing the national debt	41%	32%
Our government spending less on support for the retired, disabled, and sick	36%	25%
Our government spending less on education	34%	27%
Our government spending less on healthcare	33%	25%

■ Informed about government's climate actions (n=14,040)

■ Not informed about government's climate actions (n=10,260)
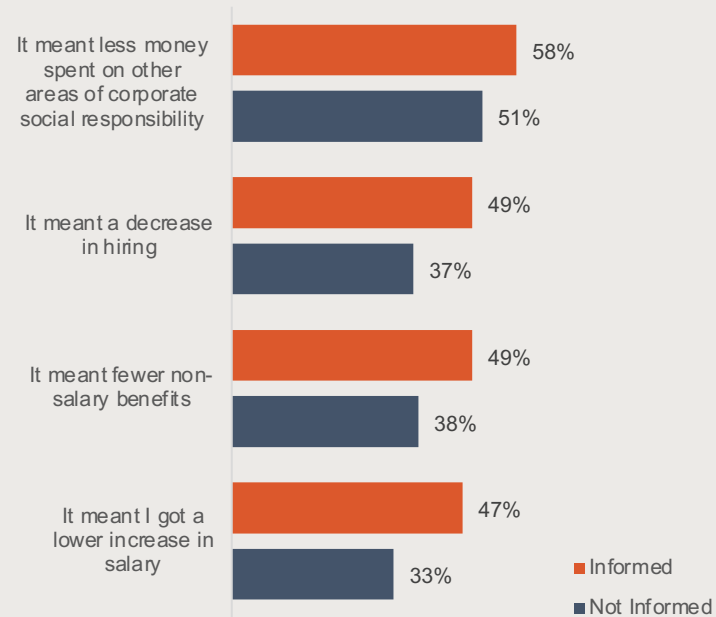
Base: 24,300 online adults aged 18+ across 39 countries

Employee Support for Corporate Climate Mitigation Spending Trade-Offs

Percent Selecting *Supporting Trade-Offs*
Informed vs *Not Informed* Employees

Category	Informed	Not Informed
It meant less money spent on other areas of corporate social responsibility	58%	51%
It meant a decrease in hiring	49%	37%
It meant fewer non-salary benefits	49%	38%
It meant I got a lower increase in salary	47%	33%

■ Informed
■ Not Informed

Base: 8,997 online employees aged 18+ across 39 countries

Employee indicates respondents who selected being employed by a company of 50+ employees

Informed is the sum of responses indicating V*ery Well Informed* and *Fairly Well Informed*

Not Informed is the sum of responses indicating *Not Very Well Informed* and *Not Informed at All*

Employees show a similar inclination to support an increase in their companies' climate investments when they are well informed. Nearly half of those who feel informed (47%) say they would support increased climate spending even if it means lower increases in salary, while only 33 percent of non-informed employees support this trade-off. Other potential trade-offs show a similar difference in employees' level of support when they are well informed: a decrease in hiring (12% difference), fewer non-salary benefits (11%), and less money spent on other areas of corporate social responsibility (7%).

With a large volume of information and disinformation around climate change, the public wants objective frameworks that demonstrate action: how companies are addressing climate change, the progress they're making, and a standard measure for corporate accountability. This finding becomes especially relevant as the world prepares to learn the results from its first global stocktake at COP28. A comprehensive understanding of public perception helps to shape communication around climate actions and build support for trade-offs. It's critical to engage the public to support the difficult decisions that must be made as governments, corporations, and other stakeholders identify gaps as well as progress toward the goals of the Paris Agreement.

CONCLUSION

CONCLUSION

Across the globe, climate is top of mind, but the public wants more—and clearer—information about climate action. Additionally, people tend to find climate-related talk confusing. They want governments and corporations to communicate their actions more clearly, and they demand transparency in the form of objective frameworks for measuring progress. Clear guidelines and standards help corporations and governments to report their progress accurately, build trust among the public, and foster confidence in climate-related efforts.

Now that they have set net zero targets, countries and corporations are facing the hard part: implementation. Carrying out decarbonization strategies will be complex and costly, requiring strategic vision, bold action, and clear communication among all stakeholders. Common, standardized, and transparent frameworks are required to help track and communicate company performance on climate-related issues to the public. Communication emerges as a particularly important piece, as the public generally is unwilling to support trade-offs in exchange for increased spending on climate by their governments or employers. However, support for climate-related actions increases significantly when the public is better informed.

As the public demands greater accountability and transparency, companies face complex challenges in establishing a plan for carbon reduction. To help provide a framework for doing so, the WBCSD's climate-related Corporate Performance and Accountability System[10] lays out seven important steps:

1. Establishing leadership for the climate action agenda

2. Ensuring strong corporate governance on climate-related topics

3. Running a climate-related risk and opportunity assessment

4. Setting a science-informed net zero target

5. Developing and publishing a climate transition plan

6. Measuring and managing climate performance

7. Reporting and disclosing assured climate performance information

---

[10] https://www.wbcsd.org/Overview/Resources/General/Corporate-Carbon-Accountability-System
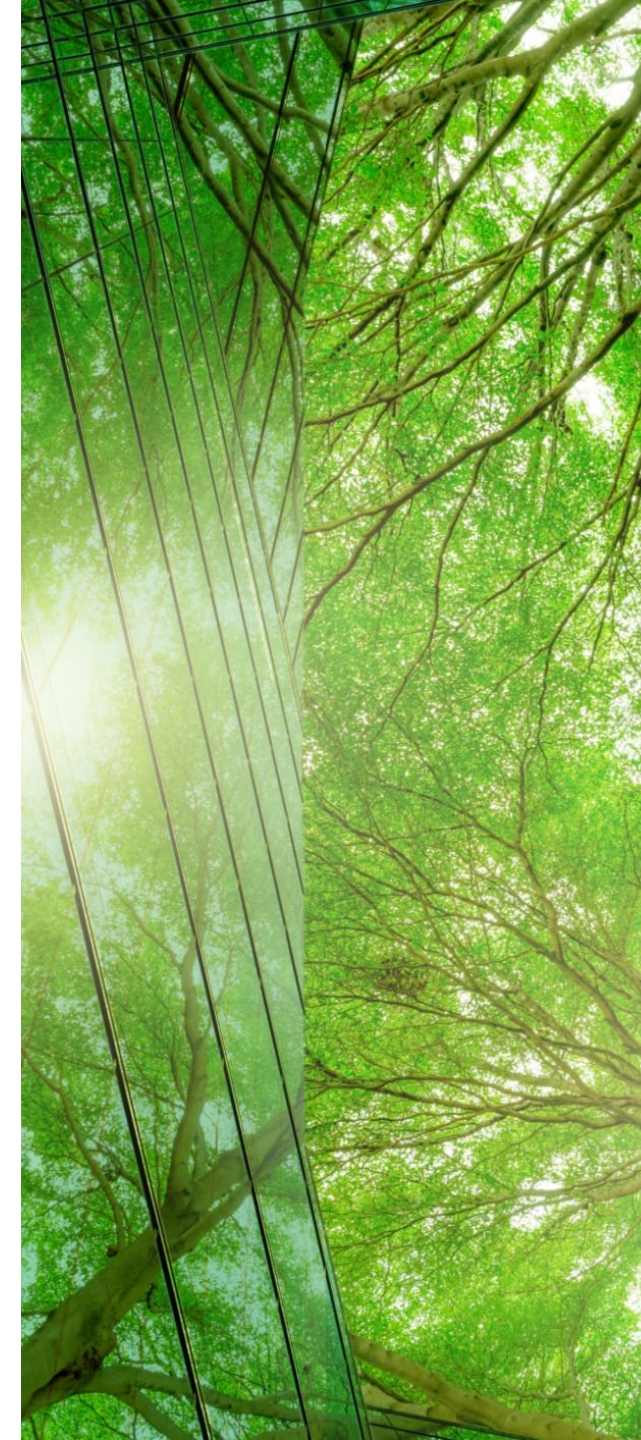
Bolstered by the Climate Action Confidence Tracker results and the clear public desire for stronger business-related frameworks on transparency and accountability, APCO and WBCSD will invite leading businesses and stakeholders to engage in an action agenda post-COP28. This initiative will help strengthen the framework for climate-related corporate performance and accountability.

There's opportunity to capitalize on a sense of global optimism, especially in emerging nations, indicating confidence in the human capacity for innovation. Corporations have an opportunity to embrace this optimism to drive positive change by embracing sustainable practices, implementing clean energy solutions, and investing in the development of new technology.

This comprehensive survey is an important step in understanding public perception about climate. Based on our learnings, APCO hopes to assist corporations in navigating these complex issues, staying informed about the latest developments, implementing effective climate and biodiversity strategies, and communicating clearly and consistently what they're doing. Together, collaboration among the public and private sectors— along with transparency to encourage public buy-in— are key to driving meaningful change.

RESEARCH METHODOLOGY

INTRODUCTION

APCO Insight, a division of APCO Worldwide, conducted an online survey across 39 markets globally from August 15–23, 2023, in partnership with the World Business Council for Sustainable Development (WBCSD). A total of 24,300 online adults participated in the survey, with an average of 600 respondents per market and a total sample of 1500 in the United States. The markets reporting herein are Argentina, Australia, Bahrain, Belgium, Brazil, Canada, Chile, China, Denmark, Egypt, Ethiopia, France, Germany, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Jordan, Kenya, the Kingdom of Saudi Arabia, Malaysia, Mexico, Morocco, Nigeria, Oman, Portugal, Qatar, Russia, Singapore, South Africa, South Korea, Spain, Sweden, United Arab Emirates, United Kingdom, and United States. The markets were categorized into five regions: Americas, APAC (Asia-Pacific), Europe, MENA (Middle East and North Africa), and Sub-Saharan Africa.

SAMPLING DESIGN

The survey used a stratified sampling approach to ensure a representative sample across diverse markets and regions. Within each market, quotas were set for age and gender to be nationally representative. Furthermore, in each market, there was an additional sample of 100 respondents aged 18 to 25 that was part of the overall sample of 600 respondents per market.

SURVEY INSTRUMENT

APCO Insight designed an online survey questionnaire that covered a range of topics relevant to the research objectives. APCO Insight pretested the questionnaire to identify and rectify any potential issues with clarity and comprehension.

DATA COLLECTION PROCESS

APCO Insight administered the survey online to the selected respondents within the specified fieldwork period, inviting participants through an online panel. The collected data provides representative insights into age and gender demographics across all markets for people aged 18–55. However, it is important to acknowledge that the survey findings may not fully represent people over 55 in certain regions, such as the majority of MENA countries, Sub-Saharan African countries, Malaysia, Indonesia, and India. This limitation arises from the overrepresentation of individuals aged 18–55 in the online panels utilized, resulting in potential skewing in the age composition of the data. Consequently, the survey results for these countries should be interpreted as reflecting the views of a more "digitally connected" segment of their population.

WEIGHTING PROCESS

APCO Insight used a two-step process in weighting the collected data to account for regional and global representativeness:

1. All countries within a region carried equal weighting in that region's figures.

2. Each region carried equal weighting within the global figures.

This two-step weighting process ensured that the results accurately represented the perspectives of the respondents in different regions.

MARGIN OF ERROR

The margin of error for the global sample of 24,300 respondents was ±0.8 points. For individual markets (n=600), the margin of error ranged from ±3.5 to ±4.0 points. In the United States (n=1500), the margin of error was ±2.5 to ±3.0 points. These margins of error provide a measure of the accuracy of the survey results.

DATA ANALYSIS

APCO Insight conducted its data analysis using statistical software to derive meaningful insights from the collected data, applying descriptive and inferential statistical techniques to analyze the responses. To examine patterns and relationships within the data, cross-tabulations were performed, and significance testing was conducted at a 95 percent confidence level. Due to rounding discrepancies, the percentages presented in this study may not always sum to precisely 100 percent. These discrepancies are minimal and do not impact the overall findings or conclusions.

CONCLUSION

The rigorous research methodology employed in this study ensured a comprehensive and representative analysis of the opinions and perspectives of the surveyed population across 39 markets. The use of a robust sampling design, careful survey instrument development, and meticulous data analysis techniques contribute to the reliability and validity of the findings.

CONTACT US

Learn more about APCO's Climate and Biodiversity team or reach out for more information at climate@apcoworldwide.com.