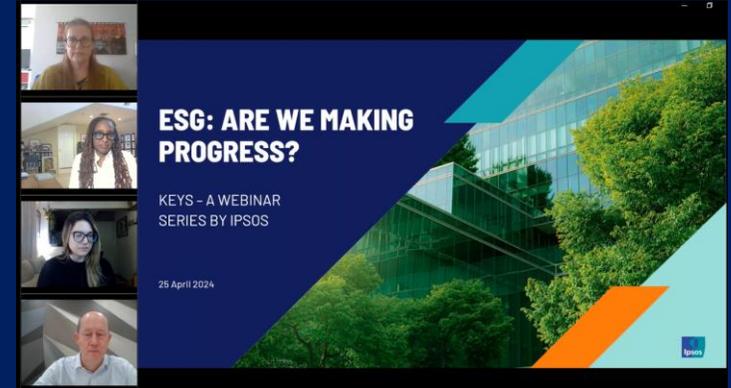


# ESG: ARE WE MAKING PROGRESS?

KEYS – A WEBINAR SERIES BY IPSOS

25 April 2024



[Watch the recording](#)

# Time to Take Stock

## ESG: ARE WE MAKING PROGRESS?

KEYS – A WEBINAR  
SERIES BY IPSOS



1

### The Climate of Public Opinion

Simon Atkinson  
*Chief Knowledge Officer*

2

### Brazil: The View from Here

Priscilla Branco  
*Senior Manager, Public Affairs & Corporate Reputation, Ipsos in Brazil*

3

### Diverse Challenges

Jane Lattimore  
*APAC Lead, Market Strategy & Understanding*

4

### The Vibrant Fringes

April Jeffries  
*Global Leader, Ethnography & Immersion*

# ESG: Right Here, Right Now

**E** Environmental

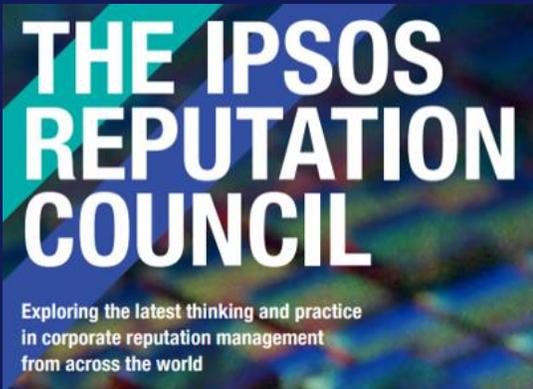
How a business affects the environment

**S** Social

How a business treats its employees, customers &

**G** Governance

How a business is run



63%

“ESG has **fundamentally changed** the way my business operates”

+8pp on a year ago

# ESG: Making Progress?



OR

NOT MUCH,  
ANYWHERE,  
ANY TIME SOON?

# ESG: Making Progress?



OR

NOT MUCH,  
ANYWHERE,  
ANY TIME SOON?

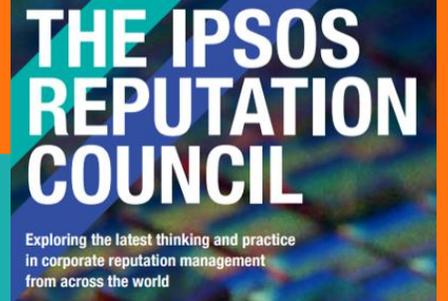
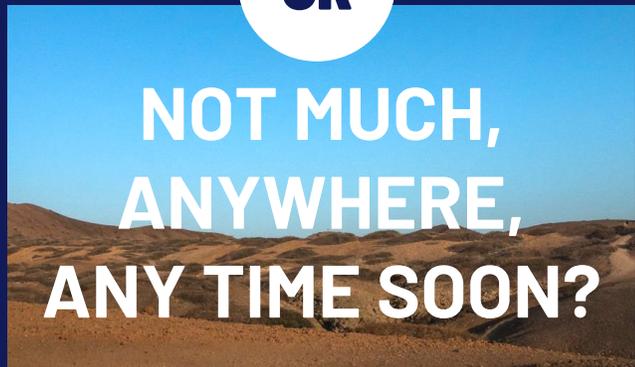
# 60%

More than 60% of businesses are **off track** to meet their sustainability goals

# ESG: Making Progress?



OR



# 80%

Too many businesses use the language of social purpose without committing to real change

# Time to Explore the Opportunities?

# 80%

Say businesses can  
do good **and still**  
**make a profit**



# Time to (Re)Build Momentum



2020

2022

2024

# Time to Act Now?

# 58%

Say if businesses in my country **do not act now** to combat climate change, they will be failing their employees and customers



# THE CLIMATE OF PUBLIC OPINION

# Expectations

For my country in 2024

GLOBAL ADVISOR  
2024 PREDICTIONS



71%

More extreme  
**weather events**



79%

**Prices will rise**  
higher than incomes



48%

Women will be paid the same as  
men **for the same work**

# EARTH DAY 2024

6 Things to Know

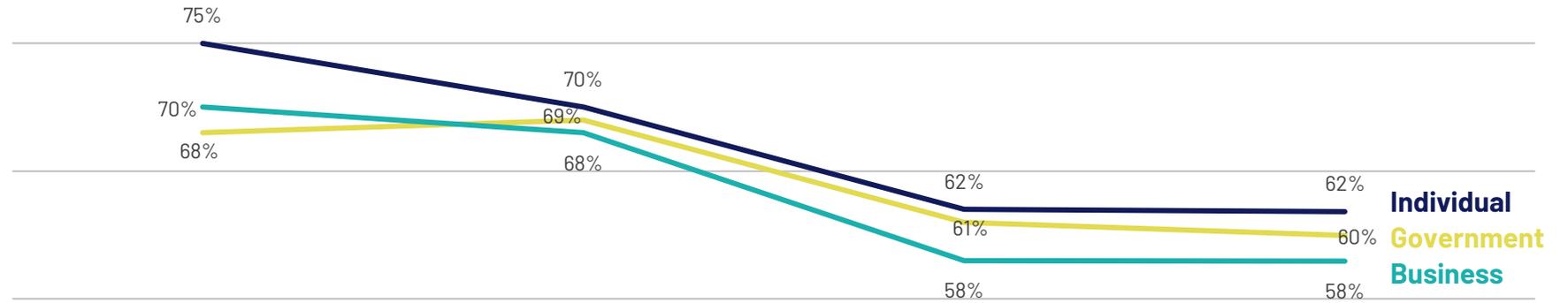


## To what extent do you agree or disagree with the following?

(26 comparator countries – trended)



Base: 2024: 24,290 online adults under the age of 75, interviewed 26 Jan – 9 Feb 2024. 2023: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023; 2022: 22,033 online adults under the age of 75, interviewed 18 Feb – 4 Mar 2022; 2021: 20,511 online adults under the age of 75, interviewed 19 Feb – 5 Mar 2021. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. The 26 comparator countries include: Argentina, Australia, Belgium, Brazil, Canada, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, South Africa, South Korea, Spain, Sweden, Switzerland, Türkiye and USA



# #1: Acting now is not as urgent as it was...

- If **individuals like me** do not act now to combat climate change, we will be failing future generations
- If **businesses in ...** do not act now to combat climate change, we will be failing their employees and customers
- If **...’s government** does not act now to combat climate change, it will be failing the people of ...

## To what extent do you agree or disagree with the following?

Climate change is beyond our control – **it's too late to do anything about it**

% Agree



Base: 24,290 online adults under the age of 75, interviewed 26 Jan – 9 Feb 2024. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population.

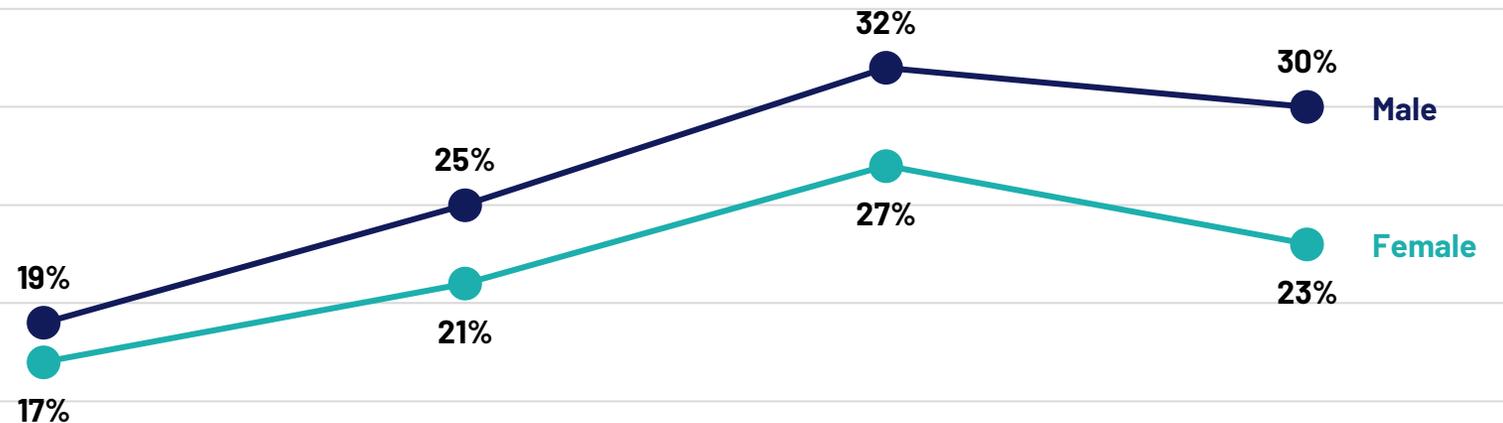
Baby Boomers

Gen X

Millennials

Gen Z

## #2: Fatalism among the young



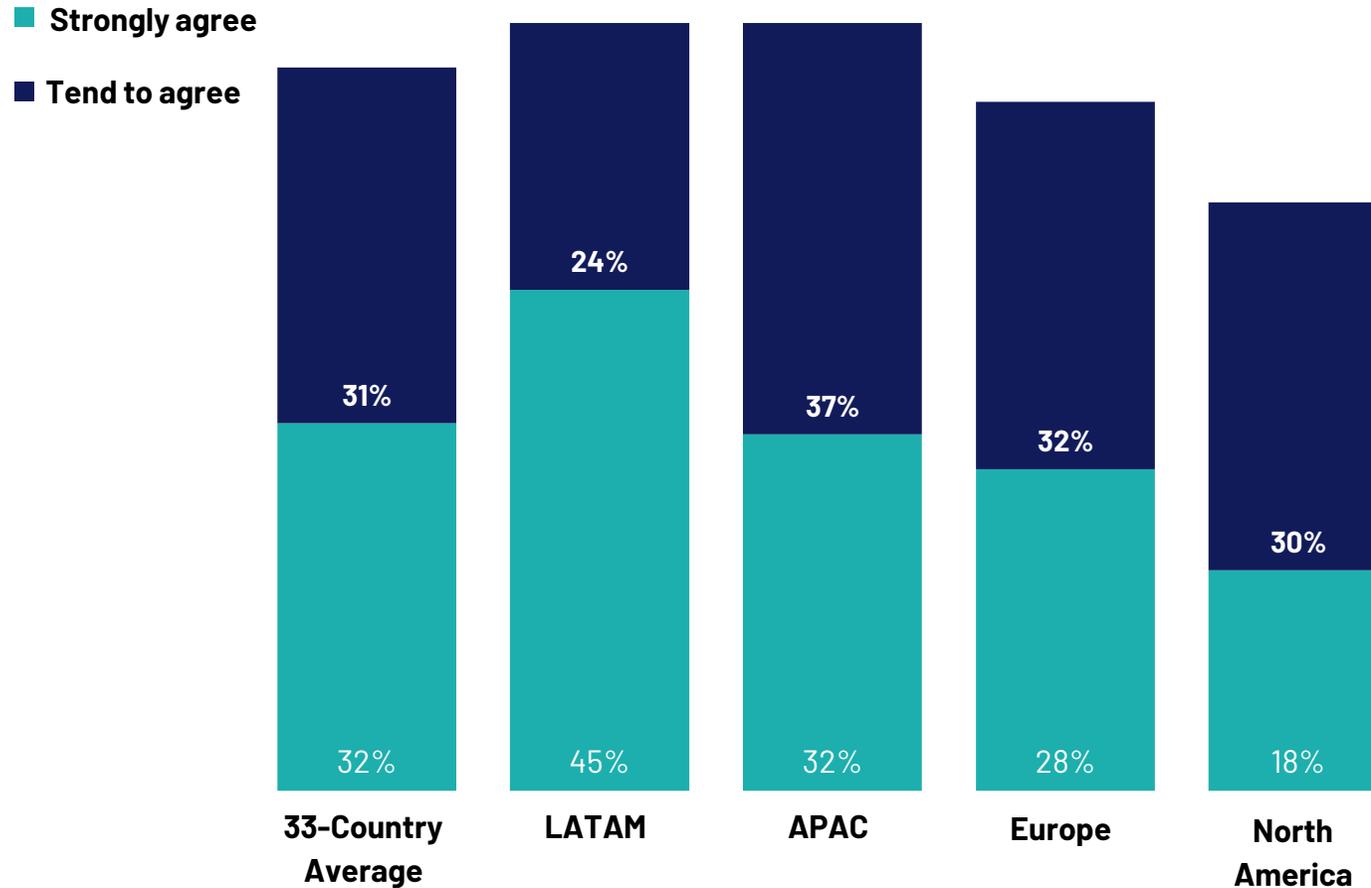
## To what extent do you agree or disagree with the following?

It is right that developed countries (such as the US, UK, Canada, Germany & France) **who have contributed most to the climate emergency**, by producing the most carbon emissions, should pay more to solve the problem



Base: 24,290 online adults under the age of 75, interviewed 26 Jan – 9 Feb 2024. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population.

# #3: Polluters should pave the way



# #4: Transition to green energy broadly welcomed



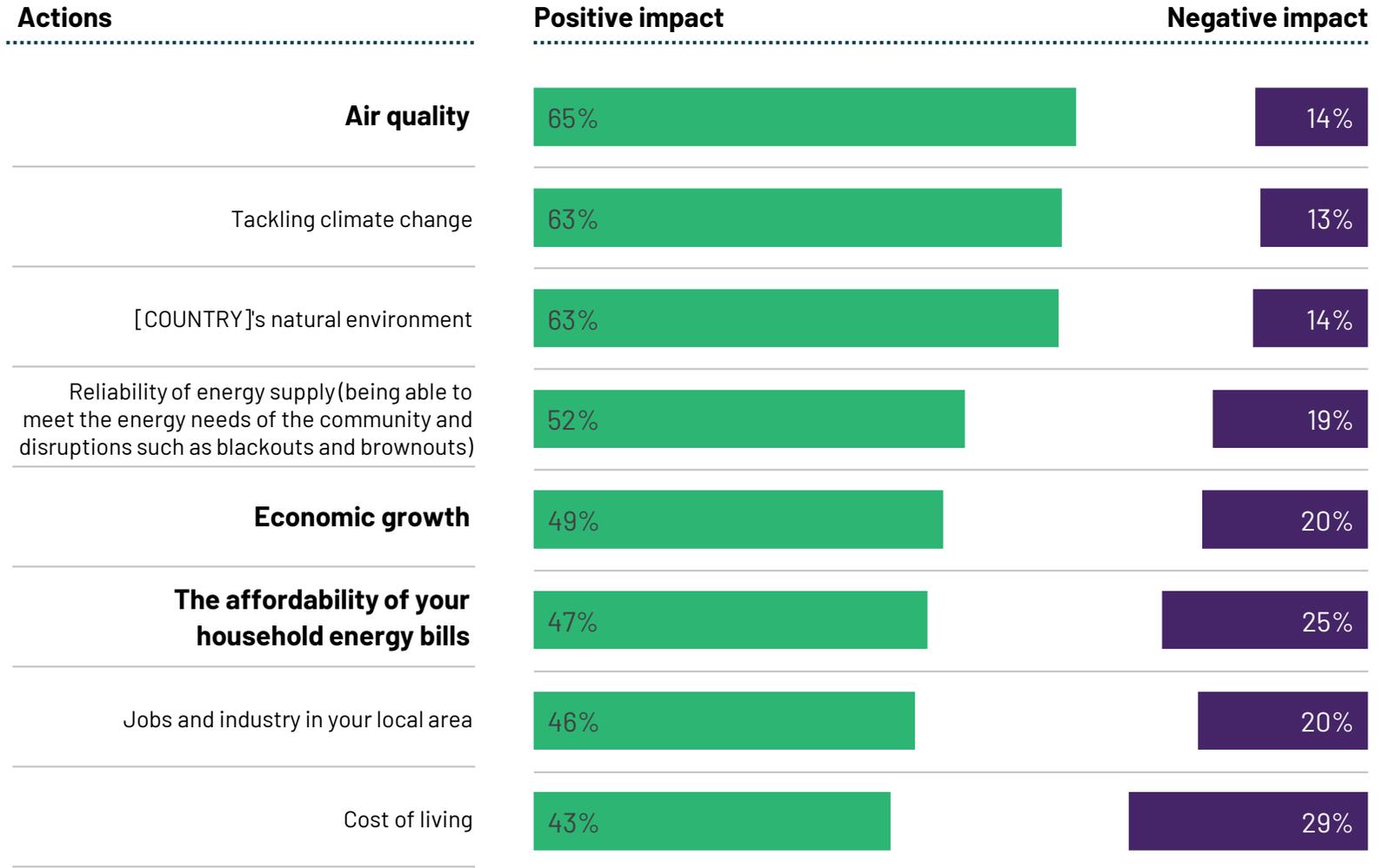
# #4: Transition to green energy broadly welcomed

## 33 country average

How, if at all, do you think transitioning [COUNTRY]'s economy away from fossil fuels and towards renewable energy is likely to impact each of the following?



Base: 24,290 online adults under the age of 75, interviewed 26 Jan – 9 Feb 2024. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population.



## #5: Beliefs lag behind climate reality



### 33 country average

Below is a list of different ways in which households could change their behaviours to reduce global greenhouse gas emissions (or carbon footprints).

**Which three of the following actions, if any, do you think would have most impact on reducing greenhouse gas emissions?**



Base: 24,290 online adults under the age of 75, interviewed 26 Jan – 9 Feb 2024. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population.

## #5: Beliefs lag behind climate reality



**Public rank recycling 2<sup>nd</sup> for reducing emissions**



**The actual data ranks it 60<sup>th</sup>**



### 33 country average

Thinking about the actions you personally can take to help fight climate change, what could encourage you to take more action, if anything?

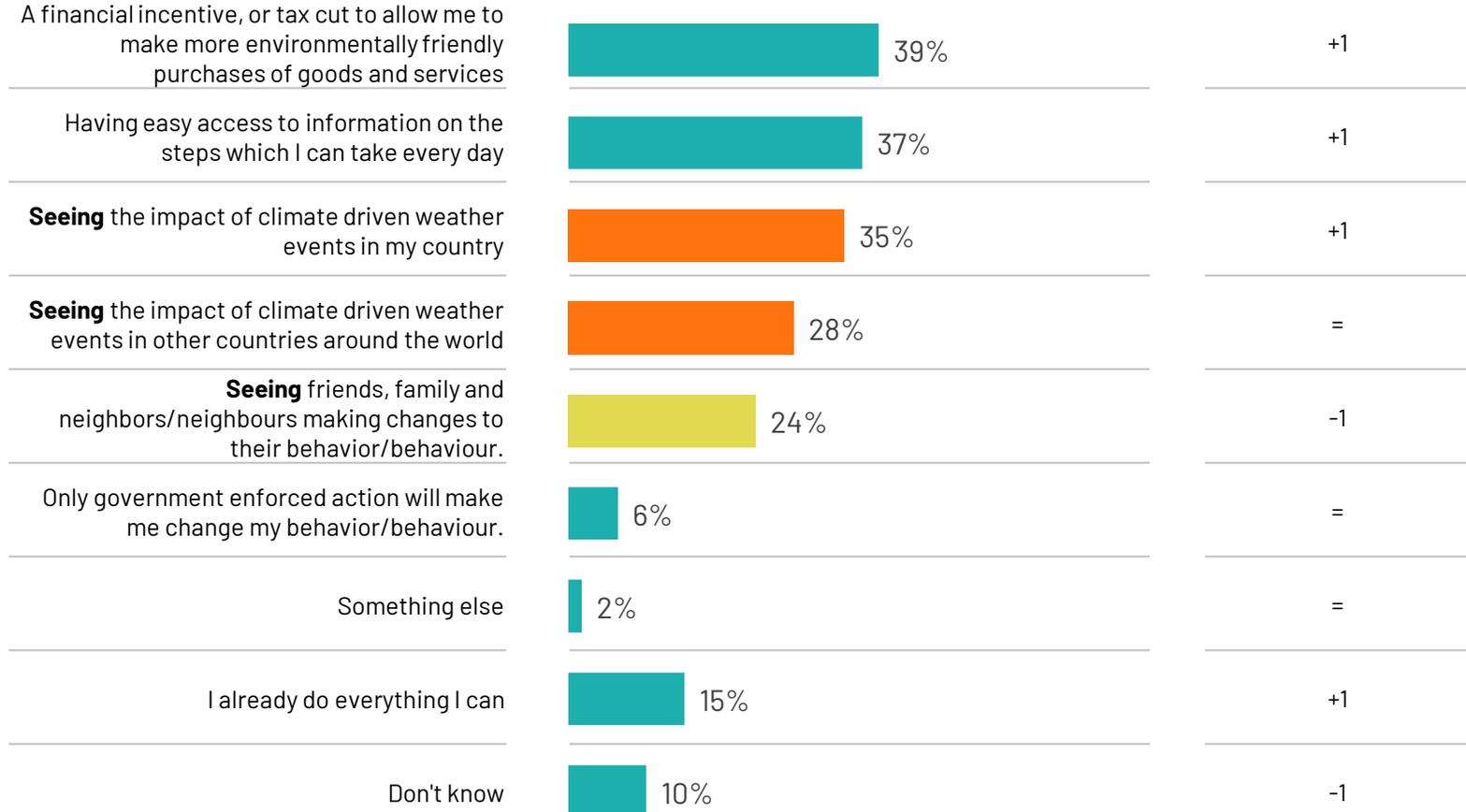


Base: 24,290 online adults under the age of 75, interviewed 26 Jan – 9 Feb 2024. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population.

# #6: Make it cheap and easy for me

## Actions

## Change Agree / 23



# Latest Ipsos research: **Behaviour Change**



Shoppers are most likely to be motivated **first by what's best for themselves**, then their immediate world, and finally by the planet more generally.

# Latest Ipsos research: Behaviour Change



Three lenses for developing sustainable strategies

---

HOW IS IT BETTER FOR....



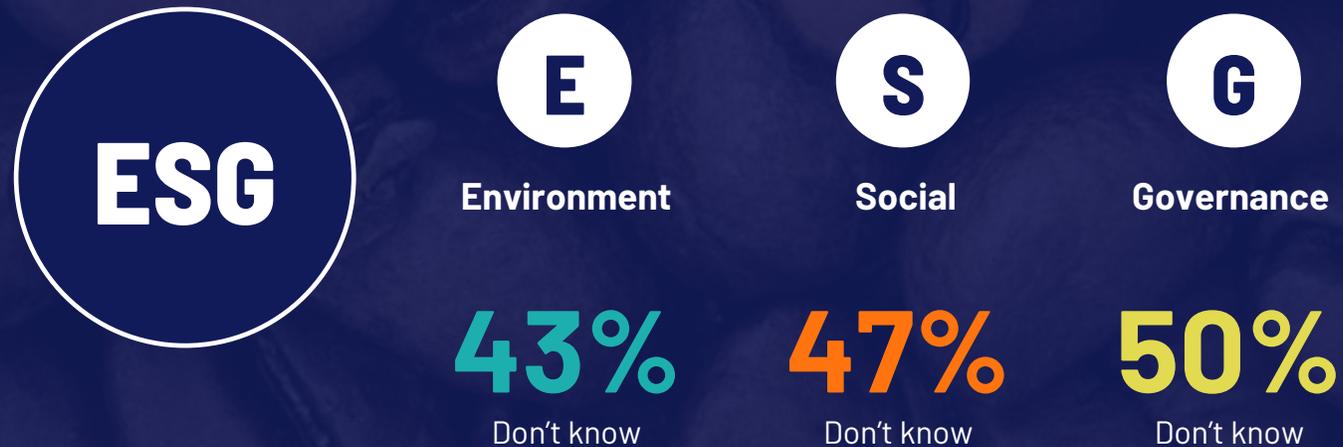
**Powerful organisations focus delivery at all three levels.**

They ensure that people feel good about what they're doing or have done at every step of the journey

# Latest Ipsos research: Building awareness



**Figure 1:** Few people are aware of what brands do in the three areas of ESG



Latest Ipsos research:

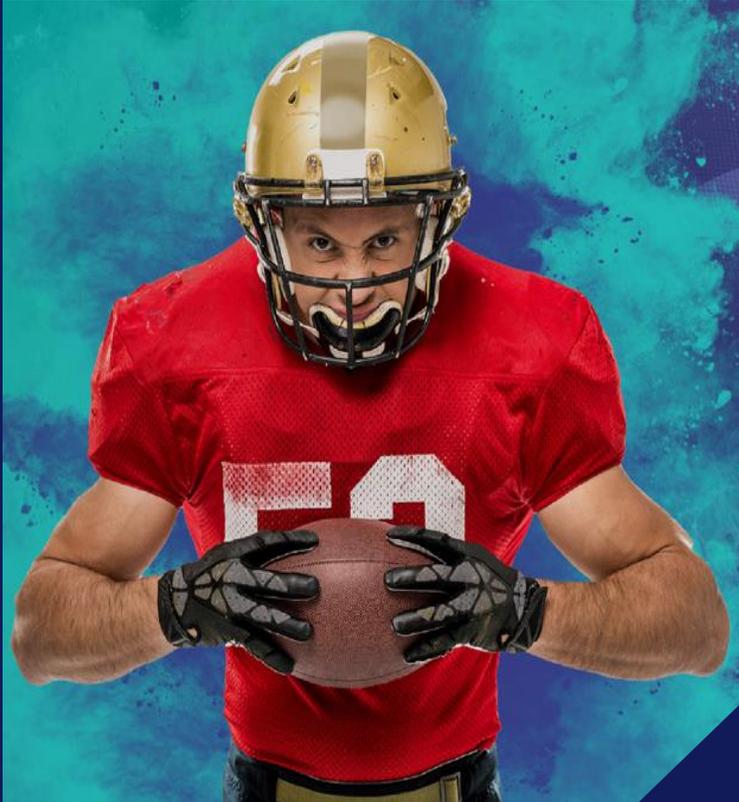
# User Experiences that Work for All



Designing for an edge case – a situation that **deviates from “the typical user experience”** – often automatically benefits all users.

Latest Ipsos research:

# Communications that Work for All



**76%**

Agree that **advertising** has the power to shape how people see each other

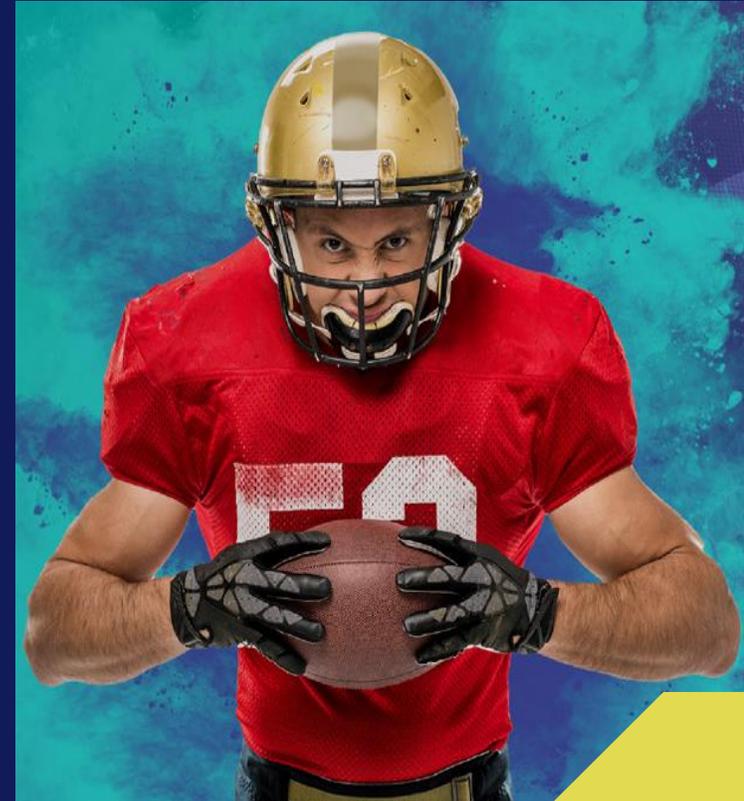
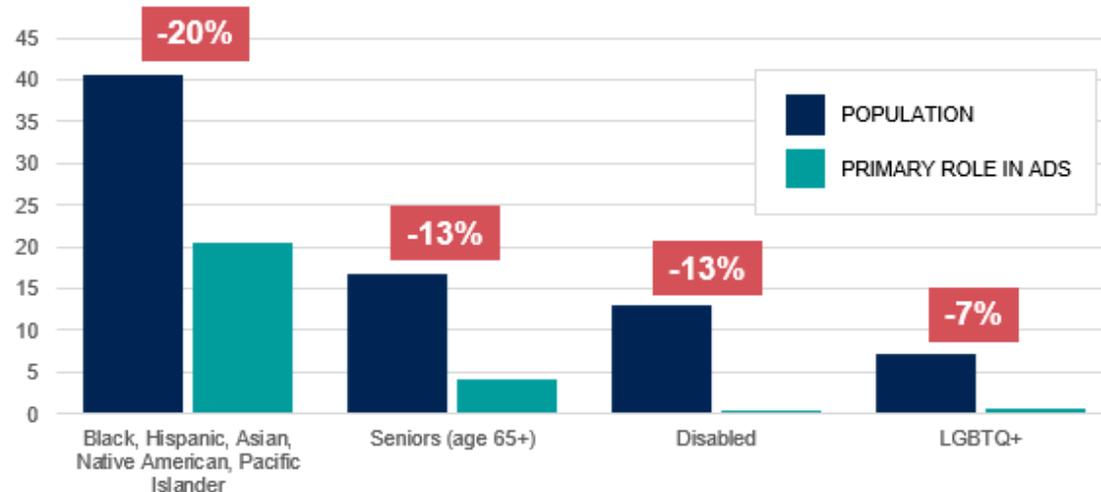
**71%**

Brands have a **responsibility to show diversity**

Latest Ipsos research:

# Communications that Work for All

THERE IS A GAP BETWEEN  
THE REAL WORLD AND THE  
ADVERTISEMENT WORLD



# Explore your focus areas

# Ipsos ESG website

## EARTH DAY 2024

Public opinion on climate change

33 countries

April 2024



### Key findings

- Conviction on climate change action on the wane**  
Globally, across 33 countries, a majority think governments, businesses and individuals have a responsibility to tackle climate change. But conviction has dropped notably over the past three years.
- Beliefs lag behind climate reality**  
Although awareness is improving, globally, people continue to misjudge which household actions would have most impact on reducing their carbon footprint. People overestimate the effectiveness of low impact actions such as recycling.
- Fatalism among the young**  
Millennial and Generation Z men feel more apathetic and fatalistic about climate change compared with older generations and with women. There is less say to already 'too late' to tackle climate change.
- Transitioning to clean energy comes at a price**  
Most are optimistic that transitioning economies away from fossil fuels will have environmental benefits, but views are mixed on the economic and affordability impacts.
- Polluters should pave the way**  
A majority globally believe that developed countries, with historically high emissions, should contribute more towards climate action. Perhaps unsurprisingly, those in developed countries are less likely to agree with this.
- Make it cheap and easy**  
Financial incentives and access to information are the leading motivators globally that could spur more climate action by individuals, followed by seeing climate impacts in their country.



## SHIFTING SHOPPERS' ESG ATTITUDES TO ACTION

How to drive behaviour change

IPSON VIEWS ESG SERIES



## THE POWER OF THE ESG X BRAND COLLABORATION

Positively shaping expectations and driving brand success

IPSON VIEWS ESG SERIES



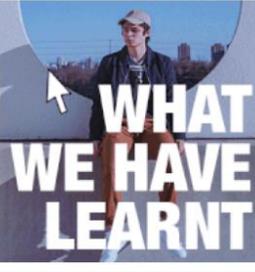
## WHY ACCESSIBLE UX MATTERS

Tips for delivering a great user experience

IPSON VIEWS ESG SERIES



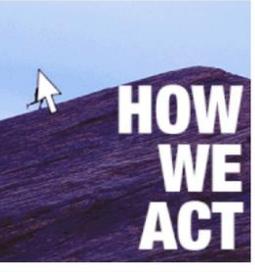
## WHAT WE HAVE LEARNT



## HOW WE CAN HELP



## HOW WE ACT




# Are we making progress?



## SETBACK:

Climate change important but not urgent;  
**is it too late already?**



## OPPORTUNITY:

Businesses can do good  
**and** make money



## CHALLENGE:

Transferring positive attitudes & aspirations to genuine **behaviour change**



## BE GROUNDED:

Country – Culture –  
Context – Category  
Matters

# BRAZIL: THE VIEW FROM HERE

Priscilla Branco

Senior Manager, Public Affairs and Corporate Reputation, Brazil

April, 25<sup>th</sup>, 2024

© Ipsos | Doc Name | Month Year |  
Version # | Public | Internal/Client  
Use Only | Strictly Confidential



# 9th

largest economy

# 8th largest

purchasing power parity

# 53.3

on the Ipsos Consumer  
Confidence Index

Rich **biodiversity** and energy  
sector powered by **clean energy**



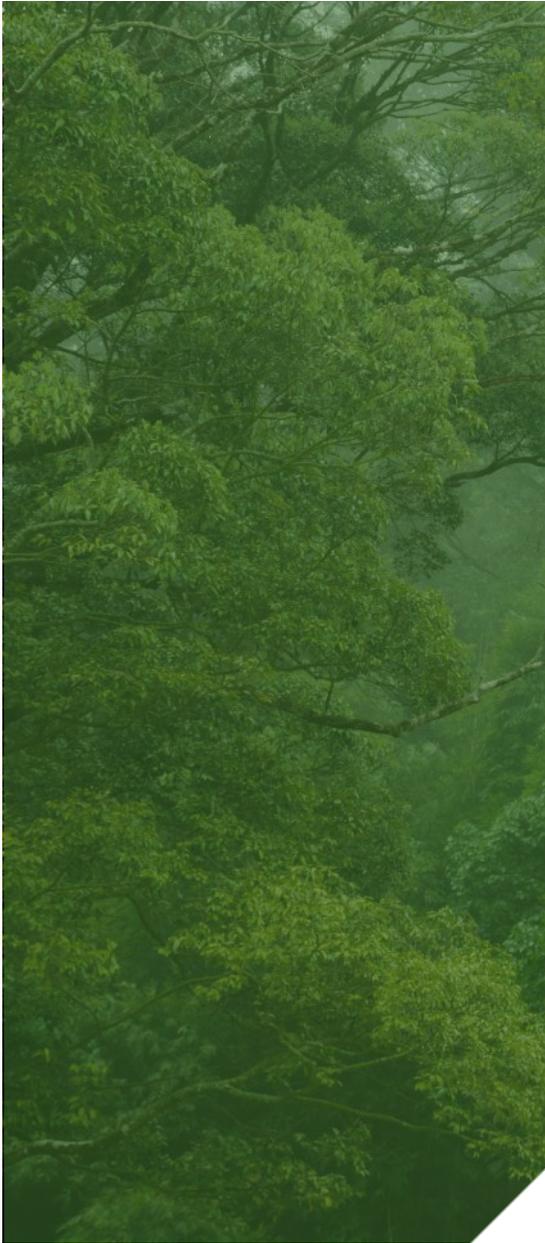
What the picture looks  
like in **2024 Brazil...**

# Yet...

there are:

- ⊕ *Political* **polarization**
- ⊕ **Structural** problems
- ⊕ Deep **inequalities**





# Environmental, Social and Governance can mean different things in developing economies...

*in Brazil:*

**33** million people **don't have access** to potable water

**36%** of Brazilians aged 18 to 24 are **unemployed**.

**4th** **Corruption** occupies the 4th position in the 'What Worries the World' ranking

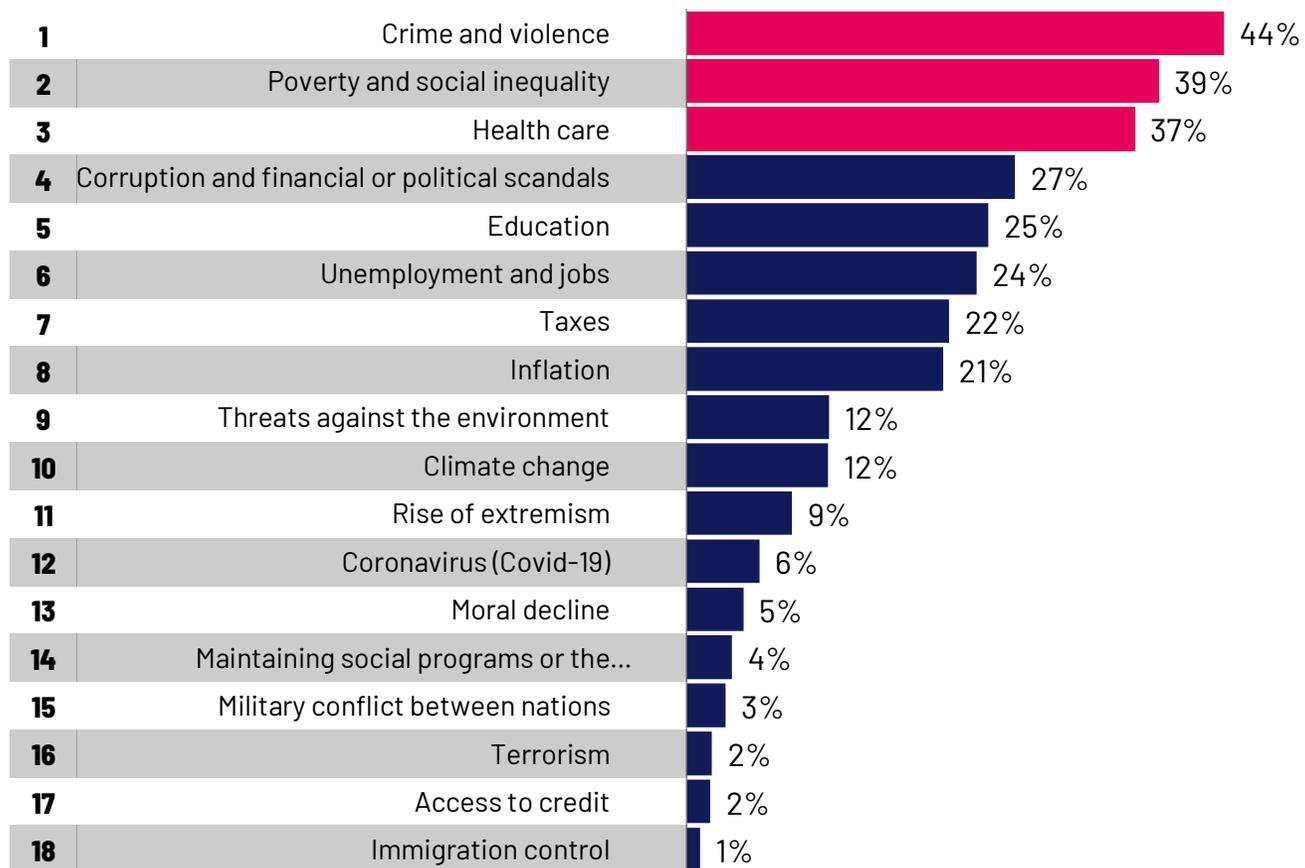
Source: IBGE. Pesquisa Nacional por Amostra de Domicílios Contínua,

Source: OCDE

Source: Ipsos What Worries the World series, march 2024



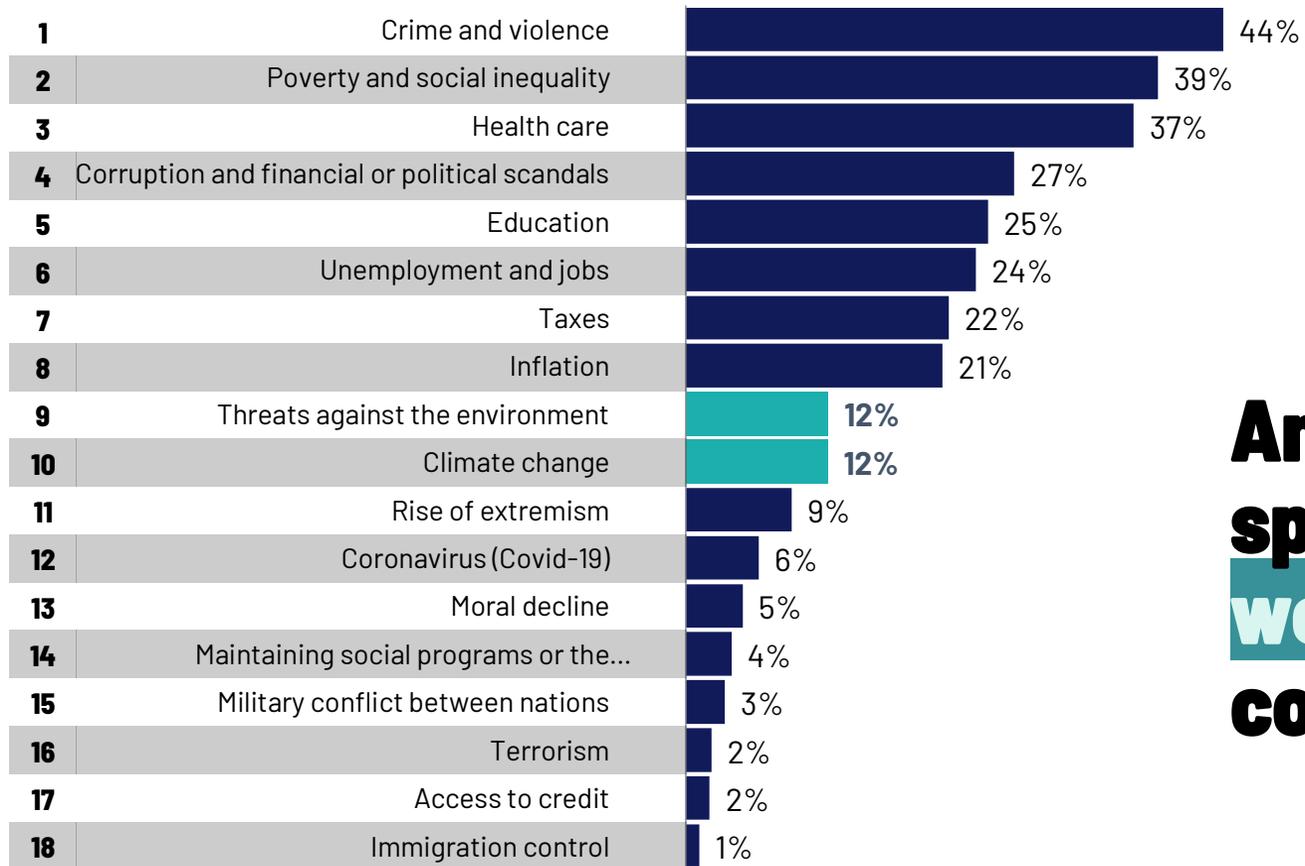
# What do Brazilians most worry about in 2024?



Yes, the top 3 issues belong to the social agenda (S), but...

...remember: poverty in developing countries is also an environmental problem (E).

Ipsos What Worries the World series, March 2024



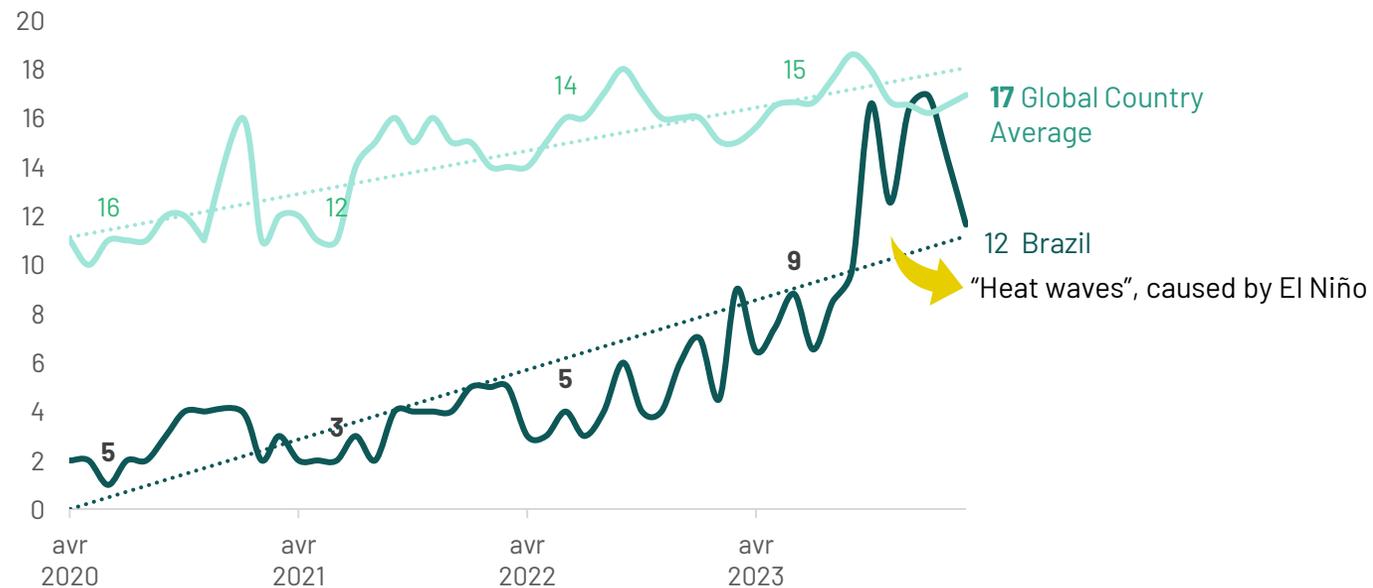
Ipsos What Worries the World series, March 2024

**And, despite the fact that specific environmental worries are not a “top concern”...**

# Overall, Brazilian public opinion is seeing an **upward trend** in its recognition as a top concern

## An upward trend in climate change salience

% consider climate change a top issue



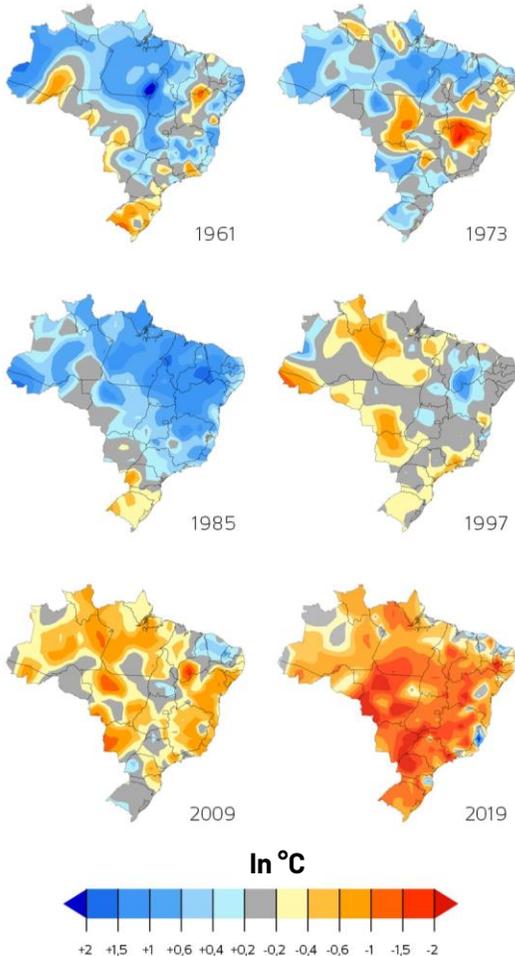
Source: What Worries the World, Ipsos results from March 2013 - 2024



## Temperature Anomalies

(deviations from mean)

1961 - 2019



**In Brazil, almost eight in ten report a severe effect of climate change in the area where they live, 12 percentage points above the global average.**

% severe effect

**79%**

Brazil

**57%**

Global Country Average

Q. How severe an effect would you say climate change has had so far in the area where you live?

Source: Ipsos Global Views on Climate Change 2023

# But external factors also contribute...

The Americas | Falling felling

**Brazil and Colombia are curbing destruction of Amazon rainforest**

Tree loss in South America fell by almost a quarter in 2023, compared with the year before



President Lula

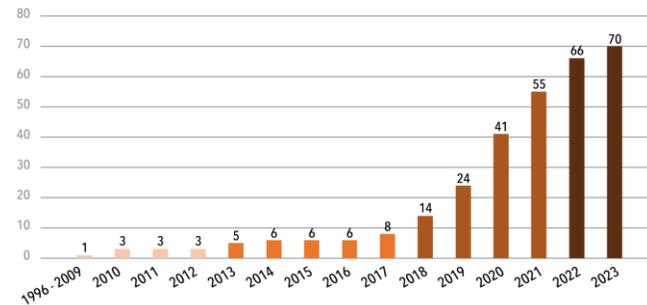
President Macron

**ESTADÃO**

## + Brazil is the 5th country with the most cases on climate change in the courts

The country's position is due to the increase in deforestation in the Amazon and the weakening of climate policy during Jair Bolsonaro's government, study shows

## + Climate Lawsuits in Brazil 1996 to 2023



Source: JUMA, PUC-RJ

**SO, WHY SHOULD  
COMPANIES BE PAYING  
ATTENTION TO ALL OF  
THIS?**





**71%**

*%agree*

**+** **LatAm:** Colombia,  
Peru and Mexico  
with similar results.

If business do not act to combat  
climate change they will be **failing**  
their employees and customers.

**59%**

*%agree*

Expect companies to take a stand  
on **social issues** that matter to  
them

Source: Ipsos Earth Day Survey, April 2024

Source: Ipsos Global Trustworthiness Report 2022

## Citizen profile regarding ESG:

% Disengaged; Complying; Discerning; Willing; Active.



Ipsos Essential - February 2024

# Brazil stands out as the country with the most activist consumers



Selected countries by % activist consumers

# IF CONTEXT IS KEY, WHAT ARE BRAZILIAN COMPANIES DOING?

# Examples of companies that understand the social context and are developing ESG actions in an **integrated way**

**E** Environmental

**ambev**

Over the last 15 years, Ambev has reduced the average **volume of water** used in the production of beverages **by 46%**.

**S** Social

**MAGALU**

ECONOMY

**Magalu opens second trainee program exclusively for black professionals**

With 21% of black people in corporate leadership positions, the company re-hires only black and brown people, with salaries of R\$6,800

The globe  
09/21/2021 - 18:01 / Updated on 09/21/2021 - 19:43

   | Newsletters 

**G** Governance

**GERDAU**

In 2022, Gerdau included new ESG clauses for **all of its supplier contracts.**

# Key Takeaways

## Are we making progress?

### ESG: ARE WE MAKING PROGRESS?

Brazil: The view from here

Priscilla Branco  
April, 25<sup>th</sup>, 2024

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- 1 Increasing awareness and importance regarding ESG. Social agenda (S), more urgent, though.
- 2 Citizen-consumers more critical towards government, companies and more aware of individual responsibilities.
- 3 Government with a positive agenda regarding ESG and a more pressured regulatory context.
- 4 Companies are “learning by doing”. Next step: positive impact.

# DIVERSE CHALLENGES

Winning with ESG in APAC

Jane Lattimore



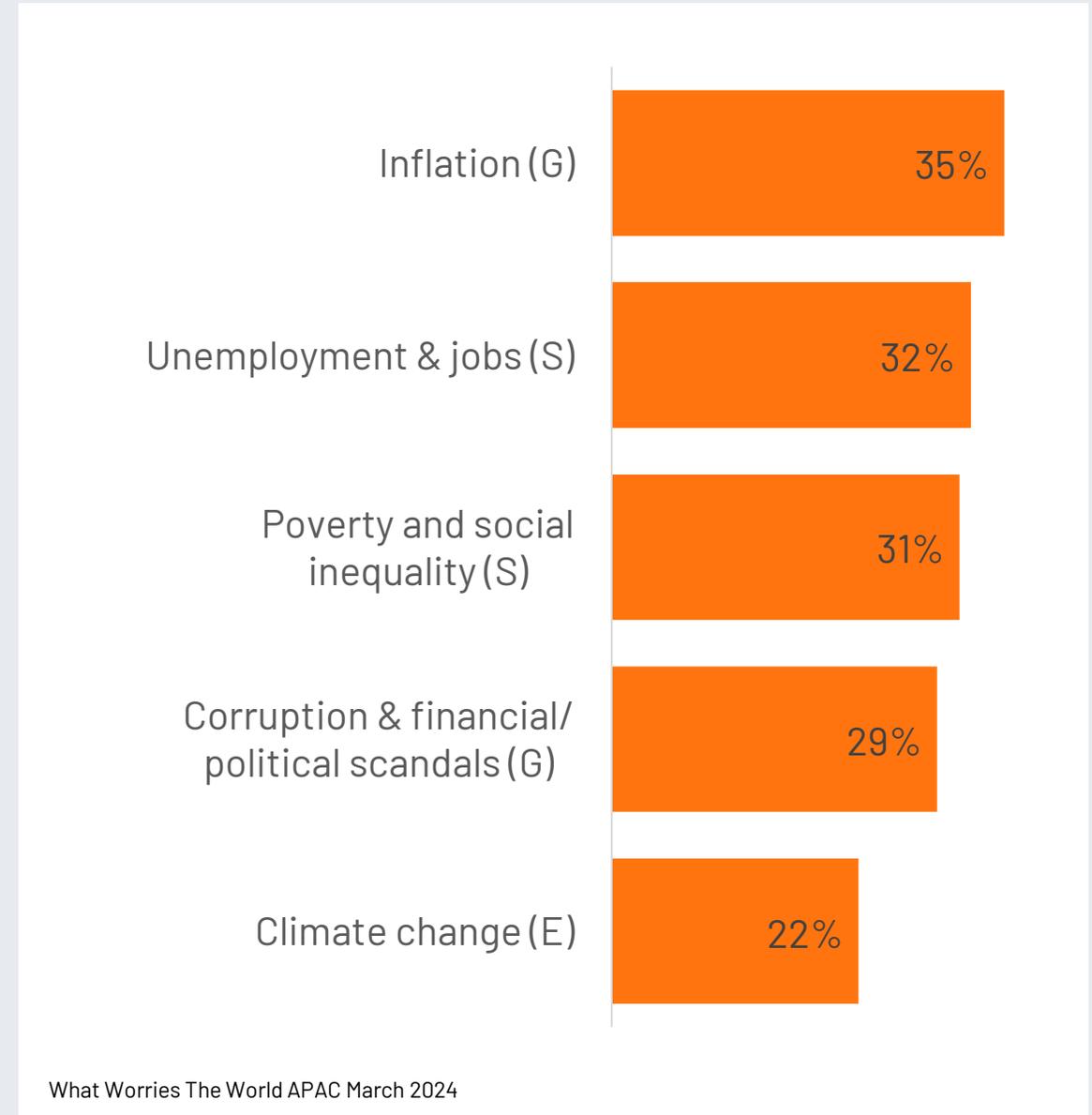
© Ipsos | KEYS webinar April 2024





# What Worries APAC

- **Education** #3 in India
- Japan, Malaysia, Singapore inc. **Taxes** in Top 5
- Australia, Singapore, S. Korea inc. **Healthcare** in Top 5

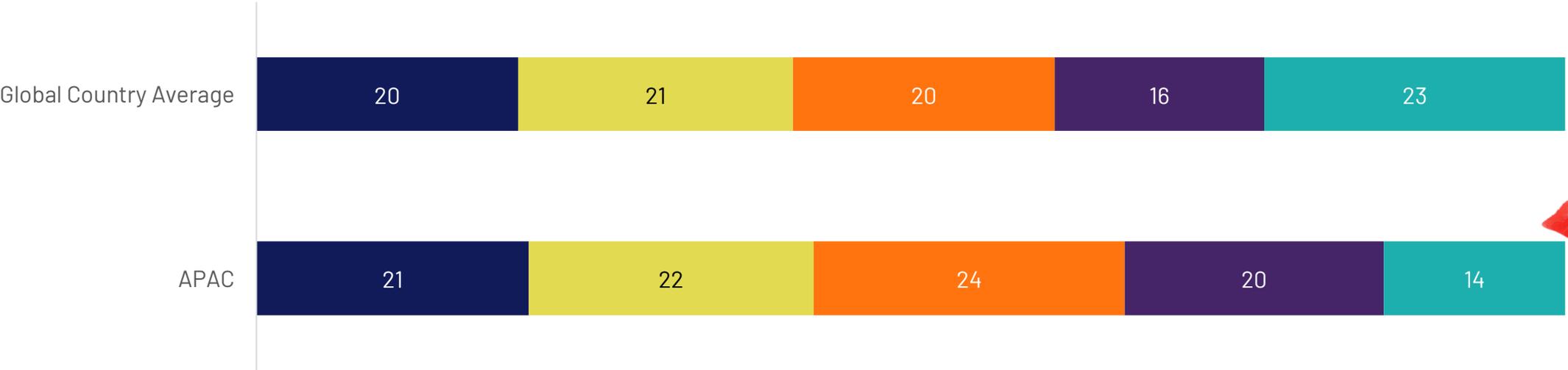


# Meet our ESG segments

## Citizen profile regarding ESG:

% Disengaged; Complying; Discerning; Willing; Active.

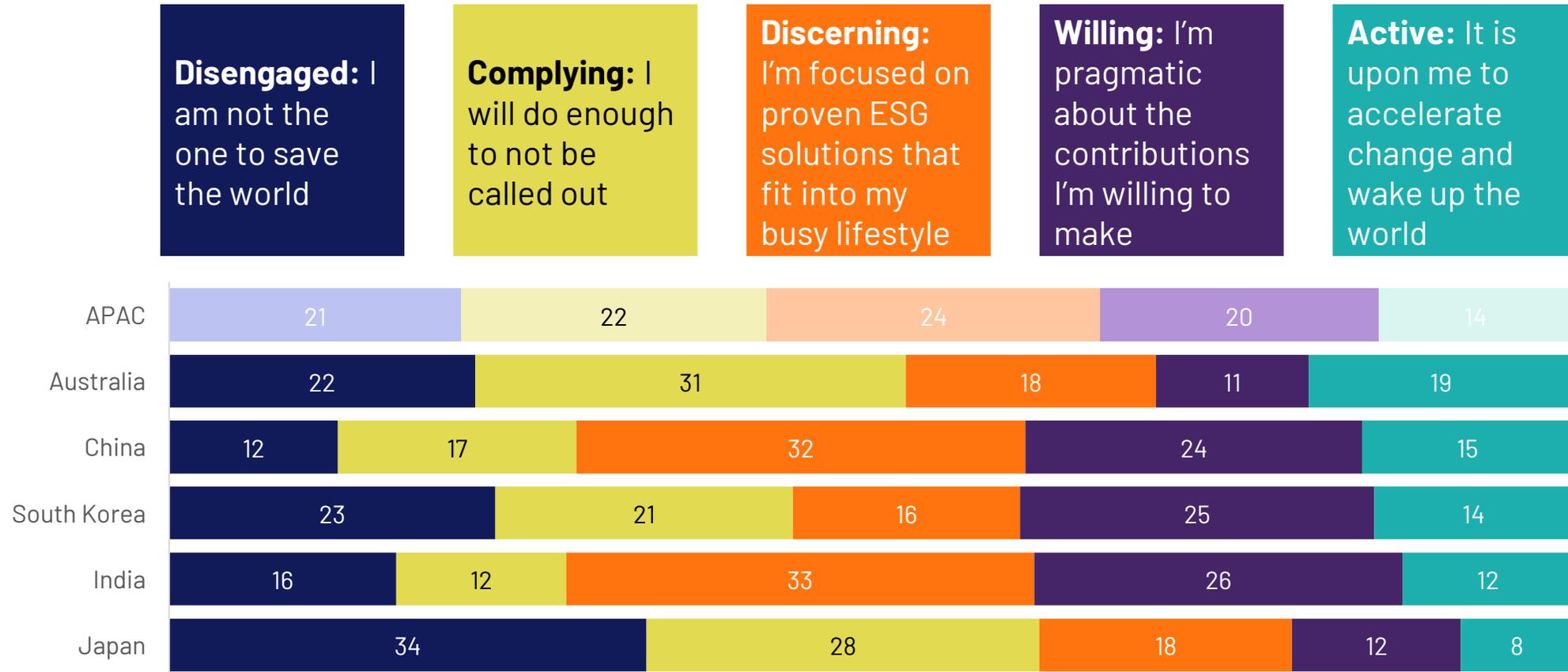
<b>Disengaged:</b> I am not the one to save the world	<b>Complying:</b> I will do enough to not be called out	<b>Discerning:</b> I'm focused on proven ESG solutions that fit into my busy lifestyle	<b>Willing:</b> I'm pragmatic about the contributions I'm willing to make	<b>Active:</b> It is upon me to accelerate change and wake up the world
-------------------------------------------------------	---------------------------------------------------------	----------------------------------------------------------------------------------------	---------------------------------------------------------------------------	-------------------------------------------------------------------------



# Meet our ESG segments

## Citizen profile regarding ESG:

% Disengaged; Complying; Discerning; Willing; Active.





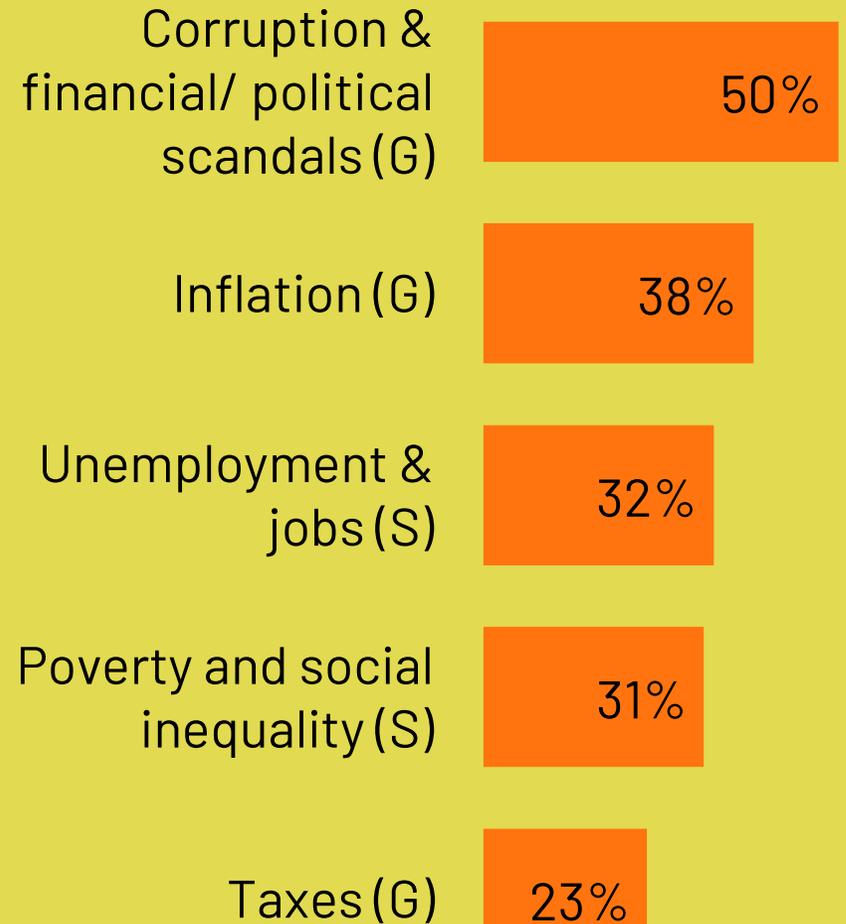
**ESG priorities are  
global, but it's the  
application that  
matters**



# Malaysia Wawasan 2030 Vision 2030

*To be a fully developed nation by 2030*

1. Economic Growth
2. Infrastructure Development
3. Human Capital Development
4. Environmental Sustainability
5. Social Well-Being



What Worries The World Malaysia March 2024

# Is Malaysia making progress?

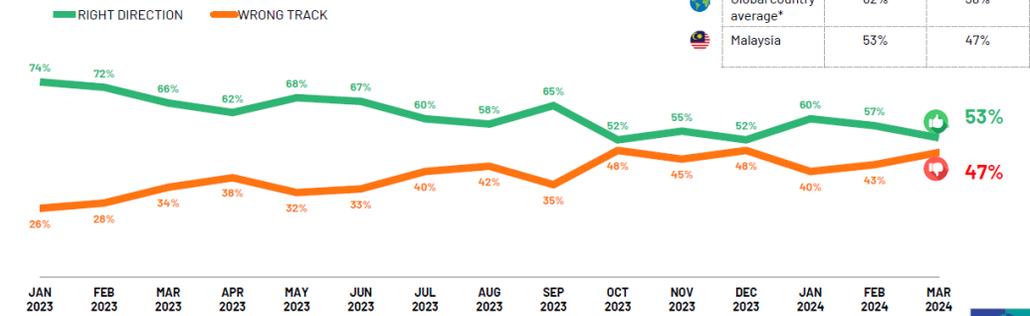
Government would say yes

People tend to disagree

## MALAYSIANS WHO BELIEVE THE COUNTRY IS ON WRONG TRACK ARE ON THE RISE

Half of the Malaysian population is still optimistic about the country's direction. However, the number of those who think the country is on the wrong track has been steadily increasing, from 26% in Jan'23 to 47% in Mar'24.

In general, would you say things in this country are heading in the right direction, or are they off on the wrong track?



Base: Representative sample of Malaysian adults aged 16-74; c.500 per month; Global: c.23,761.  
\*Global country average: Average of 29 countries  
© Ipsos | What Worries Malaysia 2024

2





# Vietnam

**52%** “businesses should lead the way”

**Strong commitment, limited action**

66% vs. 22%

Initiatives vs.  
Comprehensive plans

49% vs. 24%

ESG structure vs.  
clear governance

30% & 36%

Reporting vs. auditing

# Japan

## Government

**Net-Zero Carbon by 2050:**

Green Transformation (GX)  
Strategy

Asia Zero Emission Community  
(AZEC)

## Business

No strict regulatory framework  
ESG practices implemented by  
private sector

# Business

## Lessons to be learned

Lack of transparent regulations

Multiple measures, standards, indices

Lack of skills/ understanding at board level

Cost impact (financial and human resource)

Limited consumer support

# Key Takeaways

## Are we making progress?

### ESG: ARE WE MAKING PROGRESS?

Brazil: The view from here

Priscilla Branco

April, 25<sup>th</sup>, 2024

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**1** Citizen-consumer awareness of ESG issues is increasing and people are generally pragmatic about their impact

**2** Governments have plans to improve ESG performance, but regulations, controls and implementation are lagging

**3** Businesses don't seem to have a clear priority for ESG, feels more like a "tick box" exercise

But of course, this isn't a one-size fits all answer, each market is different

# THE VIBRANT FRINGES

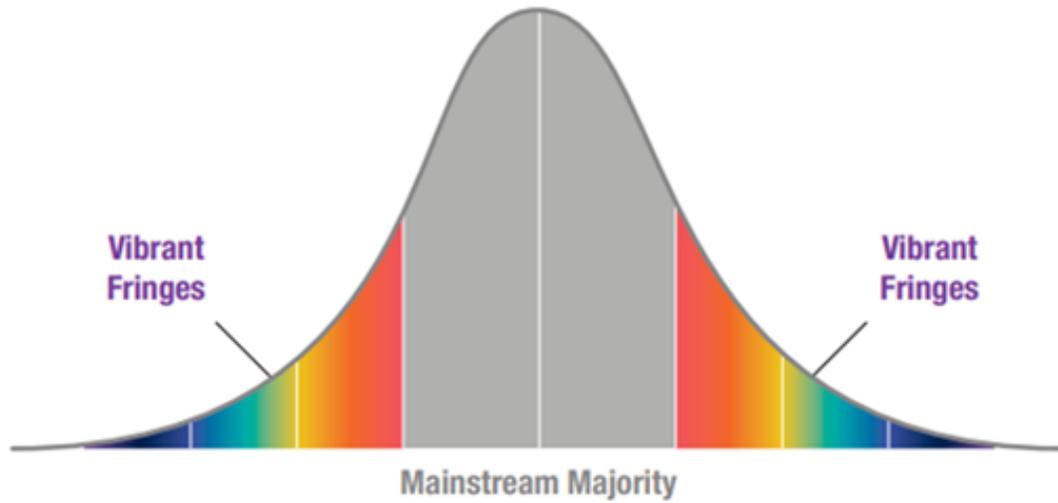
April Jeffries

# New POV Released

Engaging with people in the Vibrant Fringes - those colorful spaces that are typically ignored - will uncover valuable insights and help organizations get ahead of the desires and demands of tomorrow.



# A Changing world





People who have fingers probably would have never even thought to think that way.



“We’re not in Kansas anymore”

Dorothy

**9MM**

**US Multiracial  
population in 2010**

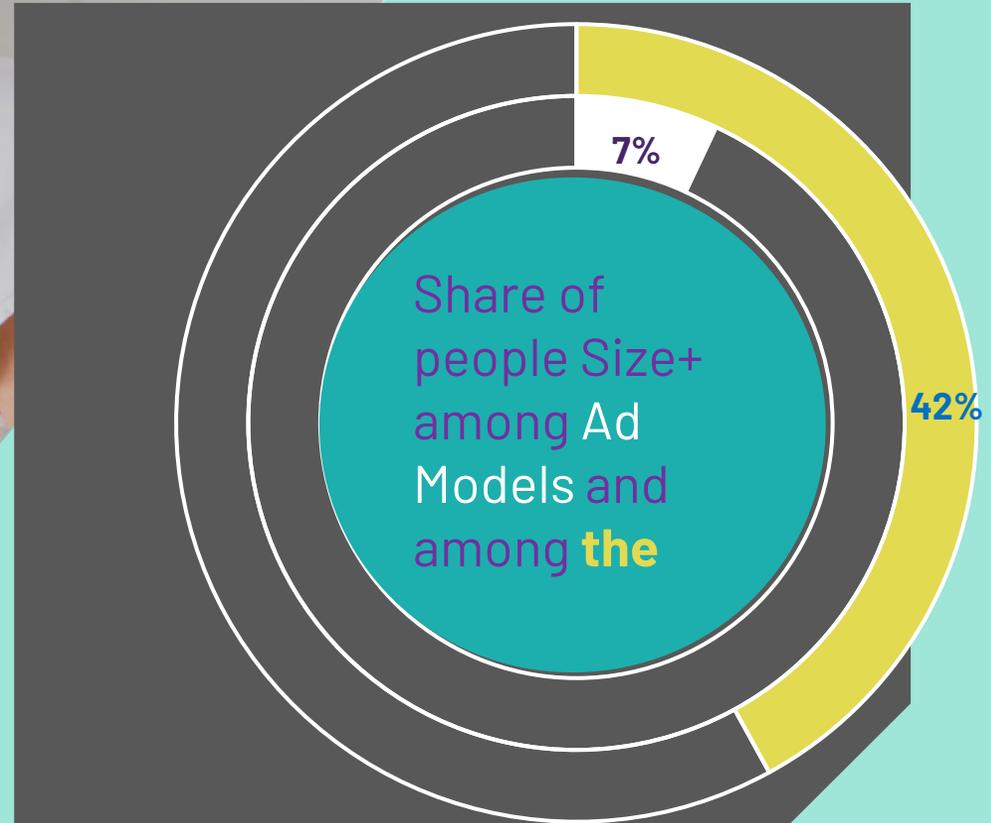
**34MM**

**US Multiracial  
population in 2020**

# 42%

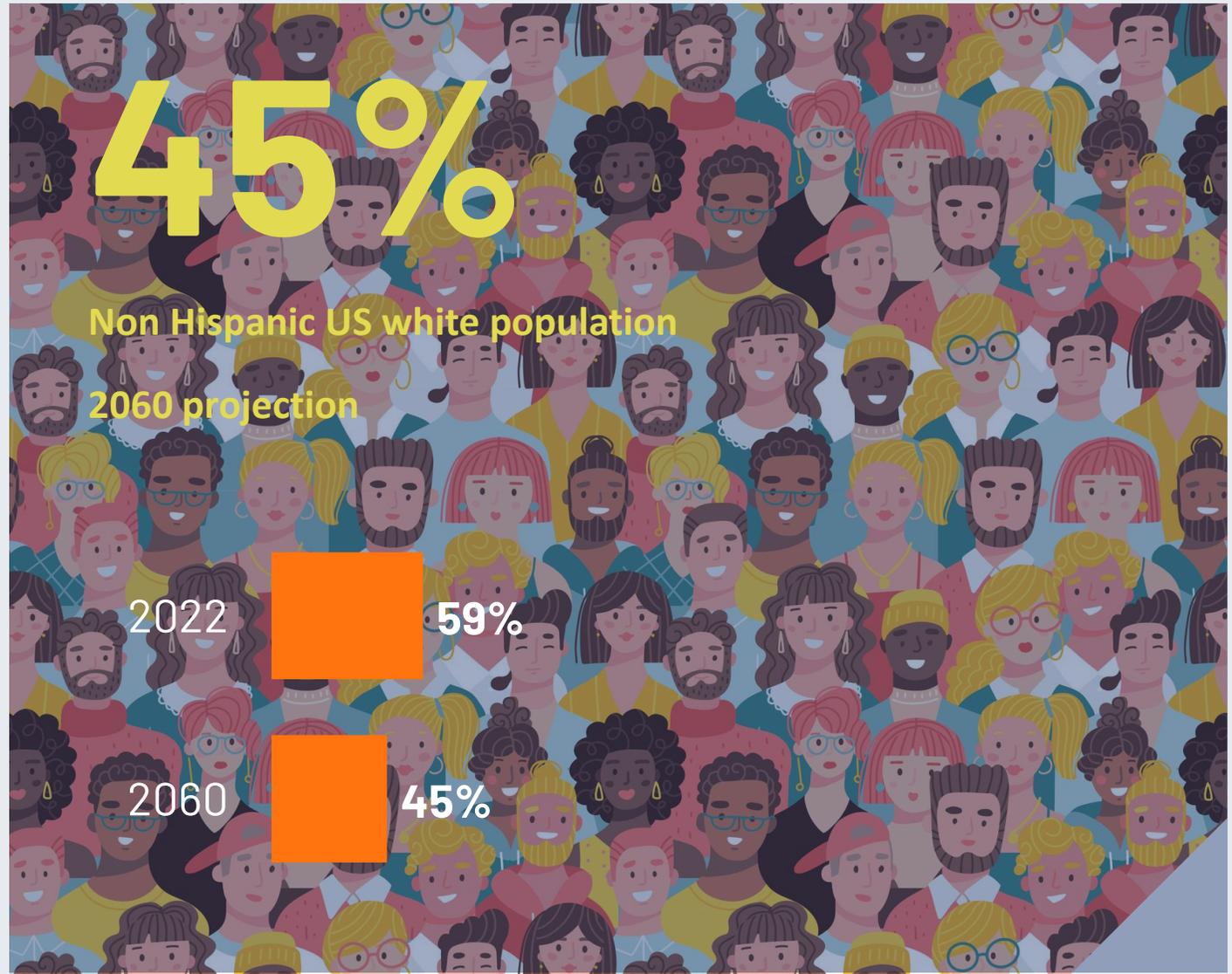
General US PlusSize Population

# 7% PlusSize among Ad Models



# No longer a majority

Non-Hispanic Whites' share of US Population is projected to decline from 59% in 2022 to 45% in 2060.



# 16%

**of the world's  
population  
experience  
significant disability**

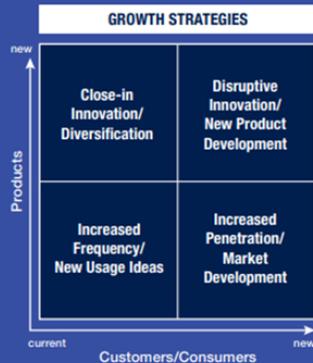




# The Opportunity Canvas

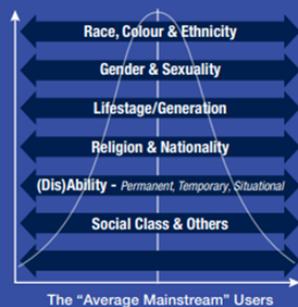
## 01 THE GOAL

*What are you seeking to achieve?*  
*New market, innovation, fresh perspective, inspiration?*



## 02 DEFINE INTERSECTIONAL DIMENSIONS

*Consider consumer, culture, context and category*



## 03

### EXPLORATION OF FRINGE OPPORTUNITIES

*Who do we need to study to meet the strategic goal?*

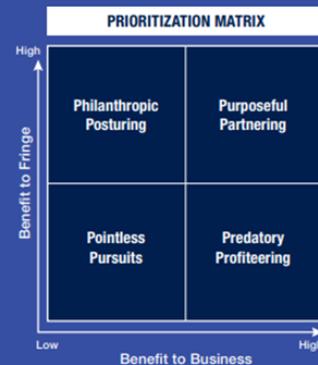
## 04 EMPATHETIC UNDERSTANDING OF TENSIONS

*What is the meaningful insight/tensions/problems faced?*



## 05 PRIORITIZING THE PATH

*What are you doing and why are you doing it?*  
*What's the right path for your business?*



## 06 THE ENDGAME

*How will this help us to achieve our business objective?*



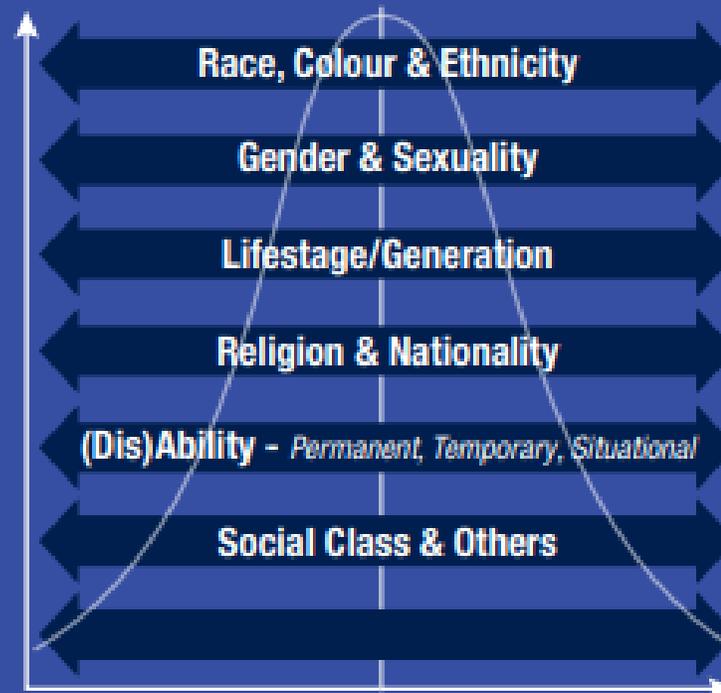
# The Opportunity Canvas



## 02

### DEFINE INTERSECTIONAL DIMENSIONS

*Consider consumer, culture, context and category*



The "Average Mainstream" Users

## 03

High

Benefit to Fringe



Low



## The Opportunity Canvas



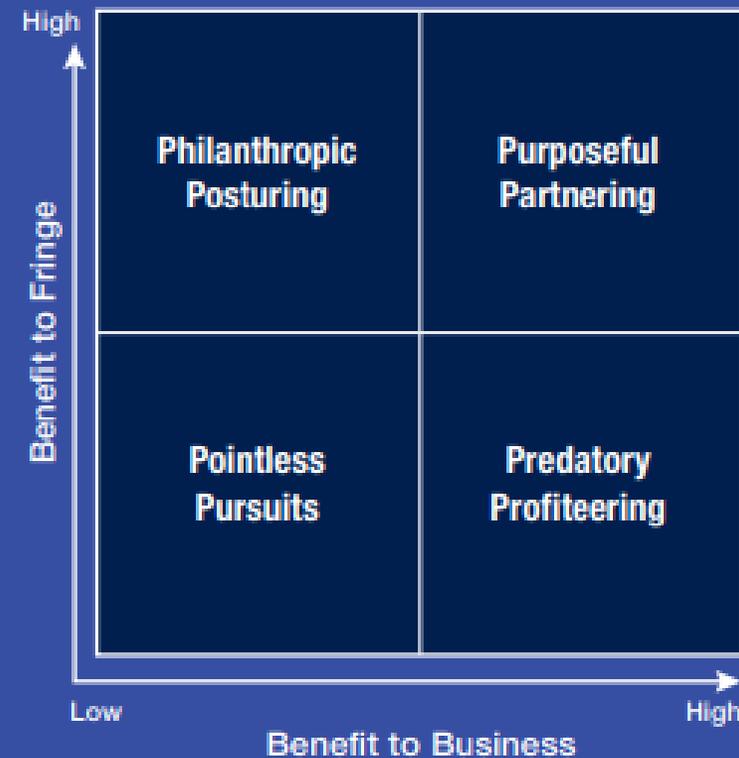
# 05

## PRIORITIZING THE PATH

*What are you doing and why are you doing it?*

*What's the right path for your business?*

### PRIORITIZATION MATRIX



# 06

## THE END

*How will our business...*



# Key Takeaways



**1** Recognize shifting demographics and emerging attitudes.

**2** Empathize with the fringes to expose incremental growth opportunities.

**3** Listen deeply for genuine experience, needs and tensions.

**4** Communicate genuinely to loyal brand followers.



Benefit to everyone!



# KEYS

AN IPSOS WEBINAR SERIES

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