

All the Difference in the World

AS THE PANDEMIC SWEEPED AROUND THE GLOBE many argued that climate change would be pushed down the public agenda—a long-term, often abstract threat replaced by a clear and present danger.

Brunswick wanted to understand how COVID-19 had really affected people's views on climate change. But just as importantly, how should business and government engage with the public on climate in the post-pandemic recovery? Which messages on taking climate action resonated the most powerfully? What did people expect businesses to do? How did those answers vary by country, or by political attitudes?

In one of the largest studies of its kind, we surveyed 24,000 people across eight major economies collectively responsible for about two-thirds of global GDP and half of the world's emissions. This included large-scale nationally representative polls in:

- Australia
- Brazil
- China
- Germany
- India
- Japan
- United Kingdom
- United States

How you make the argument for climate action significantly affects the extent to which the public supports it, according to **BRUNSWICK** research across eight major economies.

The research was designed with the UN High Level Climate Champions, which support the UN Race to Zero, the world's largest net-zero campaign that features cities, regions, businesses and investors.

This survey also complements many other climate-related projects conducted by Brunswick Insight over the last two years, including focus groups, in-depth interviews, and media and social media analytics.

People Expect Businesses to Act— YET QUESTION THEIR CREDIBILITY

The research was clear: The public now expect companies to do far more than simply cut their own direct emissions. Healthy majorities in every country expect businesses to help suppliers, customers and employees reduce their carbon emissions. And in every country, at least seven out of 10 people support businesses using their influence and resources to persuade governments to take more action on climate.

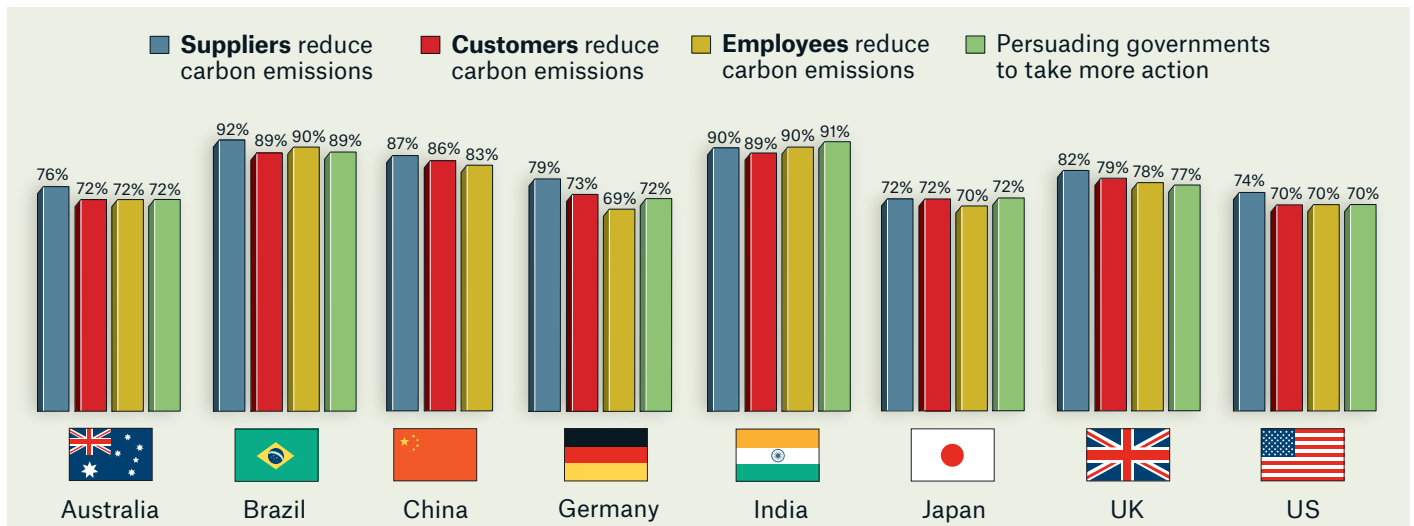
Alongside these high expectations, many people harbor deep skepticism of business as a source of information on climate change. Only in Brazil were large companies not the least trusted source (there, the government was). People were similarly doubtful of businesses' credibility on taking action.

THE RIGHT MESSAGE VARIES BY COUNTRY

There are a number of ways to frame the need for greater ambition on climate change. We tested nine of the most popular arguments to see which ones resonated and which ones didn't quite cut through. These aren't the exact arguments that respondents saw, but rather a summary of them:

THERE ARE GREAT EXPECTATIONS OF COMPANIES

Across all countries, big businesses are now expected to act beyond their own operations to reduce emissions.



RESILIENCE

Resilience versus future shocks—tackling climate change makes us more resilient to future shocks.

Transformational resilience—investing in resilience will create other positive benefits.

Build Back Better—responding to COVID-19 can create a better world than before.

VALUES

Global and national interest—it’s in our interest to help other countries tackle climate change.

Next generation—tackling climate change is necessary to protect the next generation.

Reducing waste—tackling climate change is about not wasting energy and resources.

CURRENT CONCERNS

Better jobs—tackling climate change can create new and better jobs.

Pollution blanket (health)—tackling climate change can remove the “pollution blanket” around us and protect health.

Tackling inequality—the process of tackling climate change can also reduce inequalities.

Respondents saw three randomly assigned arguments (which were about 50 words long) and then rated the impact of each on several scales. In every country, the highest-scoring argument significantly outperformed the lowest-scoring argument, reinforcing the importance of tailoring your message to the audience.

Protecting future generations and linking pollution to poor public health were the two points that resonated most powerfully—effective in all countries and with many audiences. We also found that the idea of building resilience—on which the pandemic put a premium—is most effectively framed as delivering transformative benefits, not simply adapting to or protecting the system against future shocks.

Among many other findings, we saw that linking climate action to reducing unnecessary waste was highly effective in Anglophone countries, resonating particularly well with those on the political right-of-center.

The Challenge—and Opportunity—for Businesses: MAKE THE ABSTRACT TANGIBLE AND RELATABLE

Tying pro-climate policies to job creation proved a difficult message to land. In no market was the message among the four most popular. Why would a focus on good jobs fall flat despite very real economic concerns? Our research pointed to a number of reasons. First, job creation is trumped by other, more immediate concerns, like the economy and job

TRUST OF BUSINESS ON CLIMATE IS PATCHY AT BEST

Big businesses face skepticism regarding the information they provide and the actions they take.

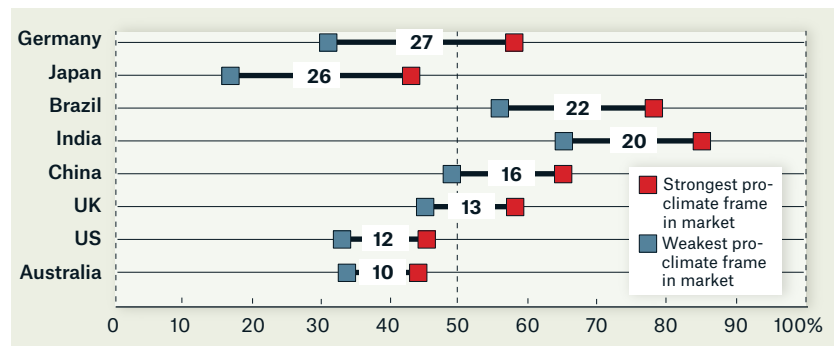
Net trust as sources of information on climate change (%)

	+61 and up	+60 to 41	+40 to 21	+20 to 0	-1 to -20	-21 to -40	-41 and under	
Scientists	+68	+77	+88	+69	+85	+49	+73	
Environmental charities & NGOs	+23	+38	+71	+28	+72	+8	+44	
Government	-10	-56	NA	0	+49	-20	-21	
Large companies	-56	-43	+51	-66	+20	-17	-62	
	Australia	Brazil	China	Germany	India	Japan	UK	US

Q. To what extent, if at all, do you trust each of the following as sources of information on climate change? Net trust: A great deal/a fair amount minus Not very much/not at all.

CHOOSING THE RIGHT FRAME CAN MAKE A DIFFERENCE

The strongest arguments in each country significantly outperform the weakest.



Q. Thinking about this statement, where would you place your views on each of the following scales? Net Agree: Strong agree (6-7) minus Strong disagree (1-2)

“OUR RESEARCH HIGHLIGHTS AN OPPORTUNITY FOR BUSINESSES: BRING ALIVE THE ECONOMIC BENEFITS OF CLIMATE ACTION.”

security. And while forecasts show tackling climate change can create more and better jobs, the connection between action on climate and jobs isn’t yet clear. We also found that this argument was harder to understand—in focus groups, people struggle to make an intuitive link or cite real life examples.

Yet there is obviously a need for companies to play a strong role in this area, and one to which they can confidently and credibly speak. Offering clear, current and tangible examples of “green and greening jobs” will help people connect the message with their world, and very likely build trust in employers when it comes to climate issues. But our research points to an important caveat: Talking about green jobs without clear examples can ring hollow.

THE IMPORTANCE OF CONSENSUS ON AN ISSUE THAT’S POLARIZING

Our research shows that the consensus across the political spectrum is fragile at best on climate action

(our analysis on this point doesn't include China, given it is a single-party state). The pro-climate political base is broad in each country, but there are sizable partisan gulfs on support for a green recovery.

This puts businesses in an interesting position. There's intense focus—especially in the year of COP26—on specific near-term commitments. Such commitments require businesses to engage with the public and build consensus—both because delivering on them will directly affect their shareholders, local communities, and employees, and because achieving success will depend on stakeholders working together. Yet building that consensus on an issue that polarizes and divides is delicate. It is a task that defies easy solutions—but which will, in all likelihood, hinge on thoughtful, targeted messaging.

TOP-LINE TAKEAWAY: Demonstrate Your Climate Ambition Is Credible

Against a backdrop of high public expectations and skepticism of big businesses, companies need to establish credibility. Our experience and research suggest that the established signals for corporate ambition on climate are committing to a 1.5°C aligned Science Based Target and joining the Race to Zero.

Yet the new expectation is for companies to act beyond their own operations to reduce emissions. In practice, that translates to:

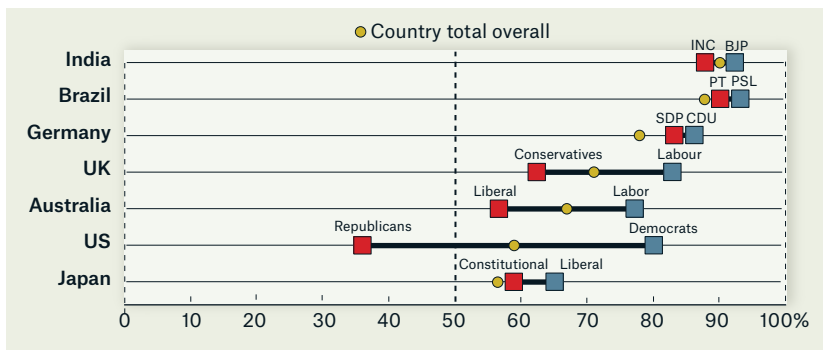
- 1** Aligning their core business with climate outcomes;
- 2** Taking action on climate across their value chains;
- 3** Advocating for governments to implement supportive policies.

Our research also highlights an opportunity for business: bring alive the economic benefits of climate action. At the moment, these aren't widely understood—job creation in particular. Yet the connection between climate action and the economic recovery from the pandemic is vital to building a public mandate. It's a point the public struggles to see—and one business is uniquely positioned to demonstrate.

PHIL DREW is a Partner in Brunswick's Business & Society offer specializing in climate change. **JAMES HALLAM**, a Director in Brunswick Insight, specializes in opinion research and stakeholder engagement. **RUAIRIDH MACINTOSH** is an Associate in Brunswick's Climate Hub, while **PAULA FIORINI**, an Account Director, and **LAURA AKROYD**, an Executive, are with Insight. All are based in London.

BROAD PRO-CLIMATE BASE, YET STARK IDEOLOGICAL DIVIDES

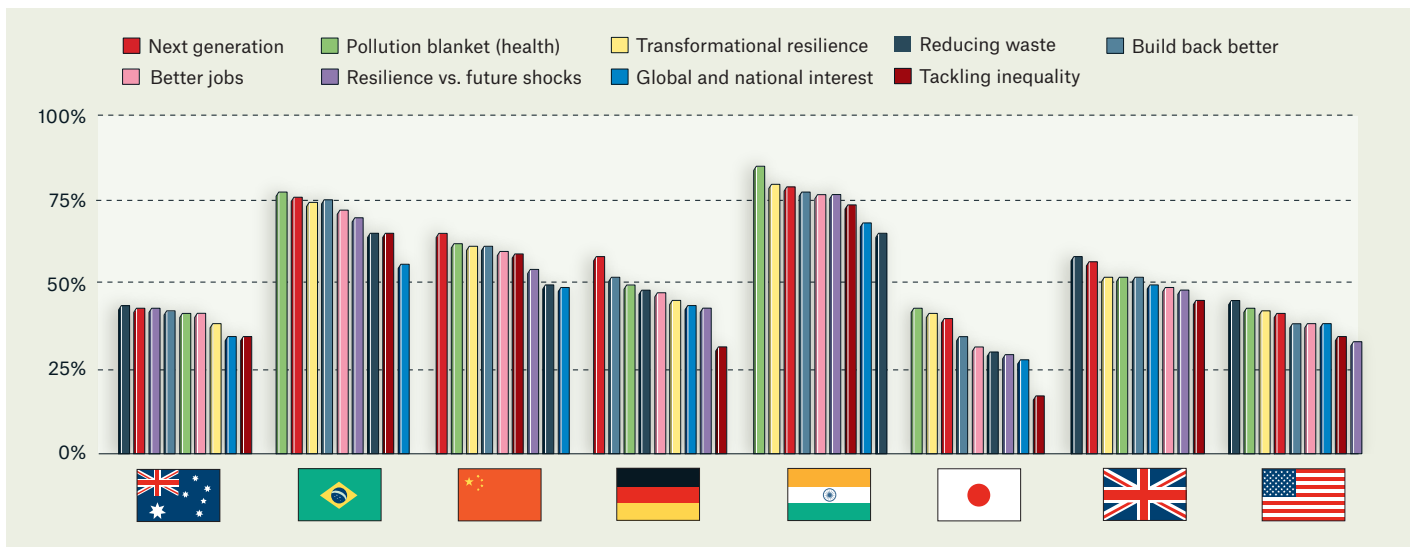
Support for a green recovery post COVID-19.



Q. How much do you support or oppose each of the following policies?

WHICH ARGUMENTS WORK BEST: A SNAPSHOT

How each of the nine major cases for climate action performed in every country.



Q. Thinking about this statement, where would you place your views on each of the following scales? Net Agree: Strong agree (6-7) minus Strong disagree(1-2)

CHARTS: PETER HOEY

BRUNSWICK

Brunswick is a critical issues firm.

We advise the world's leading companies on how to navigate the critical issues they face and engage with their critical stakeholders.

Our purpose is to help our clients play their role in the world more successfully. We help the leaders of the world's great value-creating organizations operate successfully across the increasingly complex and fast-changing arenas of finance, politics and society at large.

To download and share *Brunswick Review* stories go to www.brunswickgroup.com/review

You can follow us on Twitter
[@BrunswickGroup](https://twitter.com/BrunswickGroup)