CONSUMER EXPECTATIONS INDEX 2022

ASIA PACIFIC

Sandpiper


Inform. Create. Shape.

Foreword

We live in a time of significant change. Over the past few years, we have seen momentous events across the world, from the impact of the COVID-19 pandemic, to the tragedy of war in Ukraine, the greater frequency of climate change events, to escalating trade disputes, the energy crisis and concerns about economic growth and the re-emergence of commodity inflation.

But what impact has this had on consumer attitudes and expectations? Is the way consumers view public and private sector institutions and their leaders across Asia Pacific changing? Do people believe climate change is a reality and are they willing to take the necessary actions? Are they aware of the United Nations Sustainable Development Goals (SDGs)? Do they understand what Environmental, Social and Governance (ESG) is and is sustainability important to them? What are their expectations of governments, companies and their leaders around solving these issues?

In this report, we set out to answer these questions. Speaking to people in very different markets across the Asia Pacific region to understand their views and feelings on a range of complex topics and issues, we also asked them to consider the industries they most admire and which groups are responsible for delivering environmental, social and economic sustainability.

We will talk about how COVID-19 has shaped or contributed to people's understanding towards social and environmental responsibility sustainability issues and challenges, to find out whether the pandemic has had a role in facilitating people's understanding of the concepts.

We do not claim to have solutions, but we hope to provide insights on how consumer perceptions have changed from before the pandemic, to help with planning for 2023 and beyond.

At Sandpiper this study is important to us because it provides insights and helps to guide our mission to make sense of the challenges our clients face in a time of change.

I hope you find this second report useful. It confirms some of our preconceptions, but there are surprises in this data and it is these insights, which can help us define strategies and approaches that work for our clients across the region.

Thank you.

Emma Smith
CEO, Sandpiper

This is the second edition of Sandpiper's ***Consumer Expectations Index*** for Asia Pacific, and this year we have significantly expanded the reach of the survey. The first report, published in 2020, focused on six markets in the region. For this new edition we have added five additional markets, extending the research to 11 markets across the region. With this expanded coverage we hope to provide a more comprehensive snapshot of consumer expectations across Asia Pacific.

As part of the research, we asked consumers to consider the most challenging issues facing humanity, in order to gauge their changing perceptions and extrapolate any notable changes in attitudes compared to 2020. We should not lose sight of the gravity of some of these issues, and while our report does not directly help solve, or alleviate these, we hope that some of the key takeaways from this report can be used to help business leaders and policymakers develop more effective strategies and initiatives to address some of these challenges.

Our methodology

For this study we conducted an online survey with 6,000 consumers from 11 Asia Pacific markets: **Australia**, **China**, **Hong Kong SAR**, **India**, **Indonesia**, **Japan**, **Malaysia**, **the Philippines**, **Singapore**, **Thailand**, and **Vietnam**.

Depending on population size and complexity, a sample size of between 500 and 1,000 respondents was surveyed to provide statistically significant findings which can be extrapolated to the general population. In addition, age and gender quotas were set based on their respective proportion of the population.

Our first report in 2020 looked at six markets, **Australia**, **China**, **Hong Kong SAR**, **India**, **Malaysia** and **Singapore**, this means that when we are comparing data from the first report, it will only relate to data from 2020 in those six markets.

1. UN Sustainable Development Goals (SDGs) are widely understood
Knowledge of the UN SDGs is high, with 60% of consumers aware of them, these people also believe that it is the responsibility of both governments and companies to demonstrate how their sustainability initiatives support the achievement of the SDGs.

2. Climate change – we believe it's happening
The study shows that an overwhelming 96.8% of respondents believe that climate change is a reality, with just a very small minority (3.2%) saying otherwise. This metric was the most definitive response we got to any question in the whole survey.

3. More reluctance to change behaviours
While respondents overwhelmingly believe in climate change, not as many of us understand how it is linked to our behaviour as consumers. For instance, despite widescale backlash against single use plastics over recent years, 16.4% are against a ban on single use plastics, and more people are against a ban than in 2020 (up 3.4% from 2020: 13.0%).

4. Language matters, we should aim for simplicity when talking about sustainability
People believe in climate change and the importance of sustainability, but their understanding of terminology such as ESG is more limited. As communicators, reducing jargon and simplifying language is an important first step in facilitating greater consumer understanding. The study shows that while climate change and the concept of sustainability are nearly universally accepted, only 73.6% of people understand the acronym ESG. We must continue to talk to people in a way they understand.

5. People most concerned about poverty, climate change, ocean pollution and unemployment
This year, consumer concerns over poverty, unemployment and climate change and ocean pollution rose faster than any other issue except hunger and malnutrition. These are notable changes in our findings, as in other areas people's views and perceptions have remained consistent since 2020, but on these issues, people are much more concerned.

6. Consumers believe governments are making the strongest contribution to environmental sustainability and that we as consumers are the greatest underperformers
Governments continue to be seen as making the strongest contribution to environmental sustainability across the region, with 54% of people believing this. Only 38% believe that unlisted private companies are making a strong contribution. Interestingly, the group viewed as underperforming the most by consumers is the general public, or individuals.

7. More than 1 in 10 consumers see five sectors as irresponsible or non-compliant when it comes to regulation
Consumers believe the worst performing sectors viewed as irresponsible or non-compliant with regulation are: **mining** (21%), **government and public service** (14%), **energy** (11%), **financial services** (11%), and **construction and engineering** (11%). When a sector faces a loss of trust, it has a number of long-term ramifications, for example it is harder to attract and retain the best talent, there is less reputational leeway in a crisis and ultimately it leads to tougher regulations.

8. Findings point towards growing polarisation
The study shows that more people now believe that governments are performing strongly, or that governments are underperforming than in are 2020 index. This is a challenge facing all groups and emphasises the importance of communicating your organisation's contribution and purpose.

For more information, please contact Sandpiper:
hello@sandpipercomms.com

Understanding the principles and language of sustainability

Policymakers, governments, and corporates use a variety of terms and language to talk about sustainability, their responsible behaviour and purpose. While the terms and language are developed to define their strategy and actions, and are used with the very best of intentions, there is a risk that when talking to a consumer audience, they can be incomprehensible. In short, people may understand the principles, but not the language used to describe them.

When asked about their understanding of the labels that organisations use to communicate **corporate social responsibility**, **sustainability**, **ESG and climate change**, consumers feel their understanding of climate change is strongest, with nearly half (45.7%) saying they have a strong understanding of it, this compares to just 30.1% saying they have a strong understanding of ESG.

	2020		2022	
	Strong understanding	Average understanding	Strong understanding	Average understanding
Corporate Social Responsibility	34%	43%	33.1%	46.8%
Sustainability	38%	48%	37.2%	46.3%
Environmental, Social and Corporate Governance	33%	39%	30.5%	43.1%
Climate Change	46%	43%	45.7%	41.6%

In fact, across the region, over a quarter of people (26.5%) admit they either have no understanding of ESG, or their understanding is limited. This illustrates the importance of using language and words that are easily understood. Companies that adopt phraseology that is better suited to policymakers or industry experts will face challenges when communicating with a broader consumer audience, where the understanding of these terms is much lower.

This understanding of the policy terms across sustainability has seen little change since 2020, with levels of comprehension seeing only minor shifts between the two surveys.

Understanding the UN SDGs

In 2015 the United Nations adopted 17, interconnected **Sustainable Development Goals (SDGs)** to provide a shared blueprint for peace and prosperity for people and the planet, now and into the future in the lead up to 2030 (see pull-out box on page 8).

Our study finds that consumer awareness of the SDGs is relatively high, with just over 60% of those we surveyed saying they are aware of the SDGs, a figure that is broadly unchanged compared to 2020.

There are marked differences in awareness of the UN SDGs, both by market and between different generations. Over two thirds of people in both **China** (75.7%) and **India** (70.7%) are aware of them, this contrasts with only around a third of people in **Australia** (33.8%) and **Singapore** (36.6%).

Awareness of SDGs by countries

	2020		2022	
	Yes	No	Yes	No
Overall	59.7%	40.3%	60.5%	39.5%
Australia	27.1%	72.9%	33.8%	66.2%
China	85.5%	14.5%	75.7%	24.3%
Hong Kong SAR	54.0%	46.0%	55.0%	45.0%
India	82.6%	17.4%	70.7%	29.3%
Malaysia	69.8%	30.2%	46.0%	54.0%
Singapore	45.1%	54.9%	36.6%	63.4%

When looking at the generational differences, awareness is lowest among **baby boomers**, with just over a half of them (53.0%) saying they have knowledge of the SDGs, compared to **millennials** where that number is 65.7%. These significant difference between markets and generations is likely the result of the different priorities in education systems and the fact that the development of the SDGs came long after baby boomers completed their education.

Alongside the high awareness, was the view that both governments and private sector companies should demonstrate how their sustainability initiatives support the global SDGs, with 60% of respondents across the markets agreeing with this.

United Nations Sustainable Development Goals

The 2030 Agenda for Sustainable Development, adopted by all United Nations Member States in 2015, provides a shared blueprint for peace and prosperity for people and the planet, now and into the future. At its heart are the **17 Sustainable Development Goals (SDGs)**, which are an urgent call for action by all countries – developed and developing – in a global partnership.

They recognise that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve our oceans and forests.

sdgs.un.org/goals

In 2015, the United Nations General Assembly set 17 global Sustainable Development Goals (SDGs) for the year 2030

	2020	2022
Governments should demonstrate how their sustainability initiatives support the global SDGs	21.9%	23%
Both governments and private sector companies should demonstrate how their sustainability initiatives support	58.1%	60.3%
It is important that governments are undertaking sustainability initiatives, but they don't need to demonstrate	10.1%	7.8%
It is important that both governments and private sector companies are undertaking sustainability initiatives	8.8%	7.7%
It is not important for governments and/or private sector companies to be concerned about sustainability	1%	1.2%

Awareness of SDGs by generations

	2020		2022	
	Yes	No	Yes	No
Overall	59.7%	40.3%	60.5%	39.5%
Gen Z	65.8%	34.2%	63.0%	37.0%
Millennials	66.2%	33.8%	65.7%	34.3%
Gen X	55.9%	44.1%	58.5%	41.5%
Baby Boomer	45.3%	54.7%	53.0%	47.0%

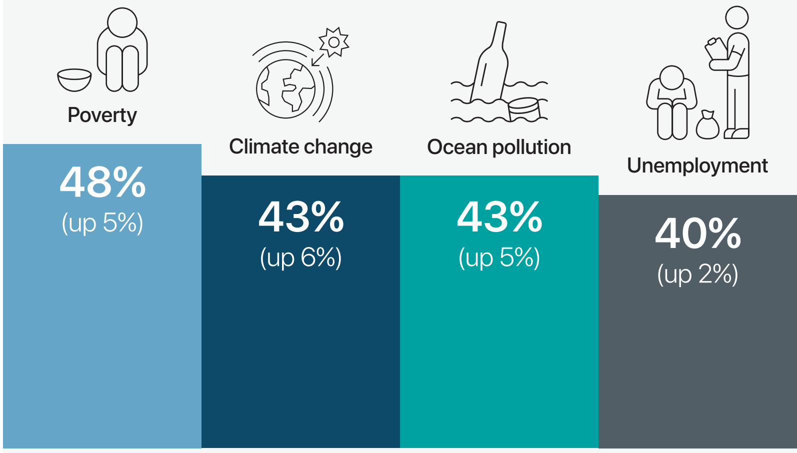
Which issues covered by the SDGs concern us the most?

Looking more closely at the SDGs, we asked people to consider what issues covered by the SDGs concern them the most.

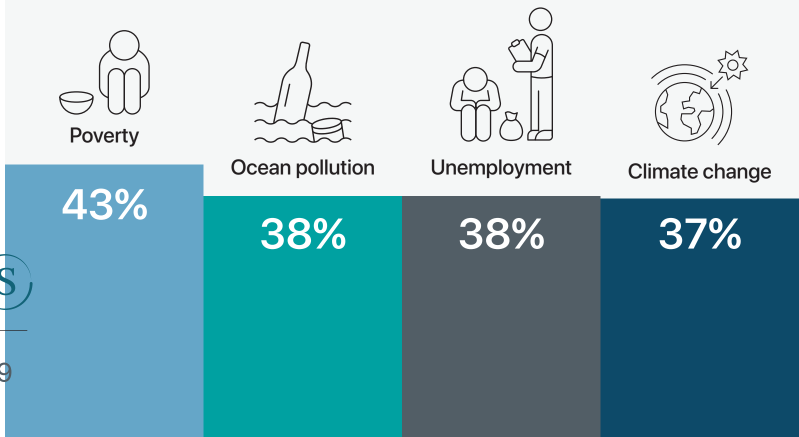
The **top four concerns** now and in the future, all of which saw 40% or more of respondents select across the region, are **poverty** (48% up 5% from 2020), **climate change** (43% up 6%), **ocean pollution** (43% up 5%) and **unemployment and slower economic growth** (40% up 2%). Other than hunger and malnutrition (36% up 8%) these four issues all saw the significant increases in people's concerns when compared to our survey in 2020.

It's striking to note there was very little shift in people's perceptions of the four areas of least concern since 2020. Consumers express the least concern over **gender inequality** which nearly a quarter (24%) of people are concerned about, a number that is unchanged from two years ago. **Building safe, resilient and sustainable cities** concerns just over a quarter of people (29%, broadly unchanged compared to 2020), with both **access to education and responsible use of resources and recycling** worrying nearly a third of people (30%).

Top concerns in 2022



Top concerns in 2020



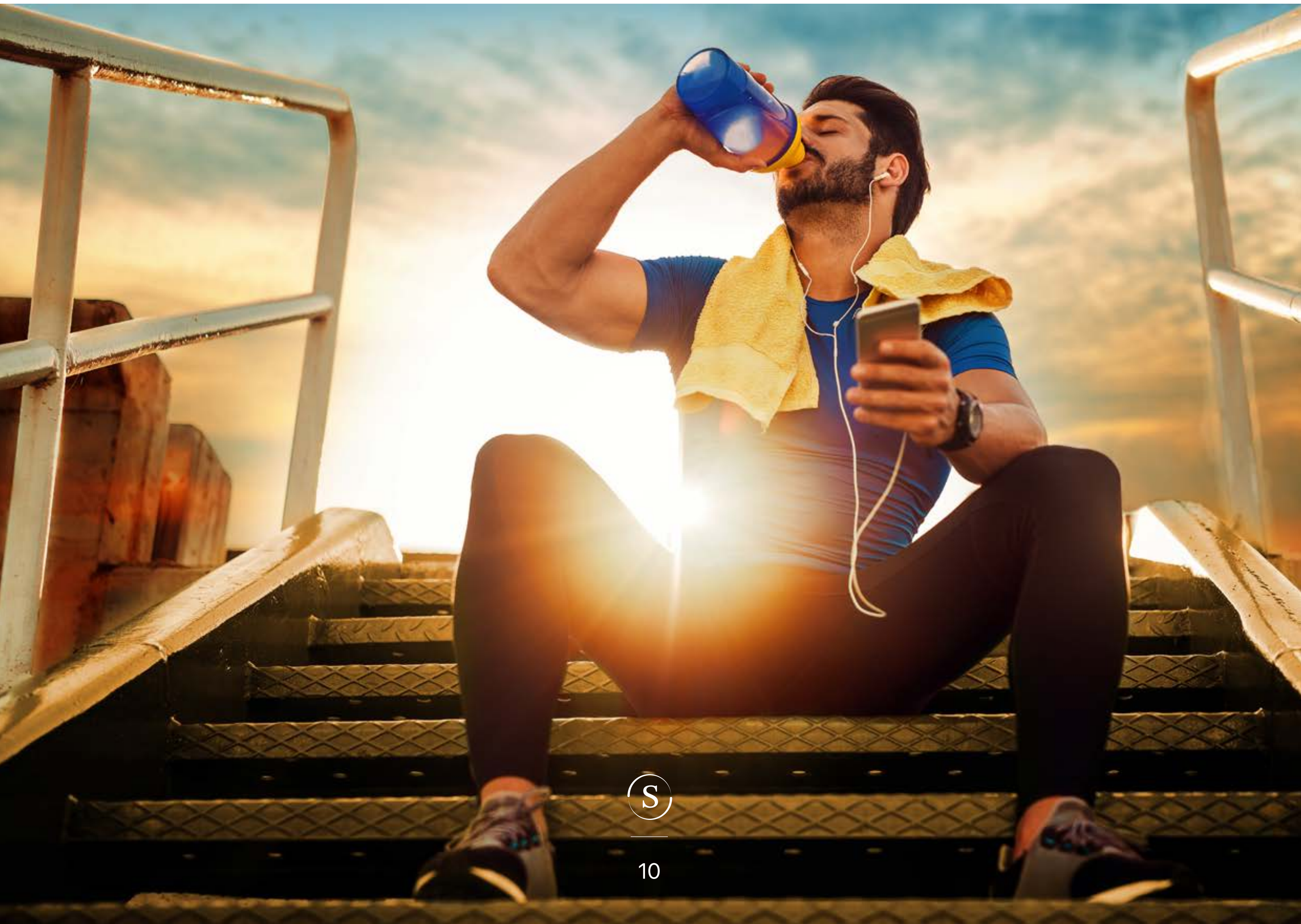
Top four concerns regionally – market breakdown

Looking at the **top four concerns regionally**, we can identify significant differences between markets. **Poverty is almost twice as likely to concern consumers** in **Indonesia** (63.0%) and **The Philippines** (59.6%), when compared to **China** (32.4%) and **Australia** (33.2%).

This is also reflected in **concerns about unemployment and slower economic growth**, on this issue people in **Indonesia** (57.5%) and **Vietnam** (50.0%) are the most concerned and again this is nearly double the number of people with similar worries in **China** (21.3%) and **Australia** (29.8%), both of which saw declines in this area form 2020.

When it comes to climate change and ocean pollution, while there are differences between markets they are not as pronounced.

For **Ocean pollution** the concern across all markets was spread between 30% and 52%, a narrower range, while the **vast majority of people believe in climate change**, the market breakdown shows consumers in some markets are much less concerned about it. In both **China** (25.6%) and **Australia** (29.0%) that concern is restricted to just over a quarter of people.



I'm worried about how this problem will develop in the future

	Poverty		Climate change		Ocean pollution		Unemployment	
	2020	2022	2020	2022	2020	2022	2020	2022
Regional	43.3%	48.2%	37.2%	43.2%	37.5%	43.1%	37.7%	40.5%
Australia	38.3%	33.2%	36.2%	29.0%	38.9%	35.6%	39.1%	29.8%
China	31.8%	32.4%	27.0%	25.6%	27.0%	30.1%	25.9%	21.3%
Hong Kong SAR	38.3%	41.4%	38.9%	36.8%	37.2%	39.6%	42.2%	36.0%
India	59.9%	55.3%	40.9%	46.6%	40.5%	44.1%	37.5%	37.4%
Indonesia		63.0%		54.8%		51.7%		57.5%
Japan		43.0%		50.6%		48.6%		41.4%
Malaysia	49.8%	49.0%	40.8%	46.6%	41.2%	44.2%	40.8%	45.2%
Singapore	43.8%	38.0%	40.7%	40.0%	41.4%	40.6%	41.5%	35.0%
Philippines		59.6%		55.6%		51.6%		49.2%
Thailand		57.8%		47.2%		47.0%		47.6%
Vietnam		57.6%		45.8%		44.0%		50.0%

What emotions do consumers feel in relation to the world's largest issues?

People express greatest 'concern' about how the following issues will develop in the future: **poverty** (48%), **unemployment** and **climate change** (both 40%).

Consumers are most '**frustrated and angry**' about: **income inequality** (30%), **hunger/malnutrition** (26%), and **protection of land, forests and biodiversity** (26%), believing these issues do not receive the attention they deserve.

They believe that they themselves are not doing enough and feel most '**guilty**' about responsible use of resources and recycling (18%), closely followed by hunger and malnutrition (16%), climate change (15%), and gender inequality (15%).

Respondents are most satisfied with **access to clean water and sanitation** (34%) and **access to education** (33%). For both of these, people feel confident that a lot of positive work is being done by governments and other organisations. The highest number of respondents are **most uneducated about or indifferent to gender inequality** (10%), followed by **global partnerships to support sustainable development** (9%) as they feel they do not know much about these issues, and are not affected by them.

What emotions do consumers feel in relation to the world's largest issues (SDGs)?

	2020					2022				
	Concern	Frustration	Guilt	Satisfied	Indifferent	Concern	Frustration	Guilt	Satisfied	Indifferent
Poverty	43%	25%	16%	14%	2%	48%	23%	14%	12%	2%
Hunger and malnutrition	28%	29%	18%	21%	4%	36%	26%	16%	18%	4%
Access to healthcare	34%	24%	14%	26%	2%	34%	25%	12%	27%	2%
Access to education	27%	21%	13%	37%	3%	30%	22%	12%	33%	3%
Gender inequality	24%	21%	14%	33%	8%	24%	22%	15%	29%	10%
Access to clean water and sanitation	29%	20%	13%	35%	3%	31%	20%	13%	34%	3%
Provision of affordable and clean energy	31%	21%	14%	31%	3%	32%	21%	13%	30%	5%
Unemployment and slow economic growth	38%	24%	13%	22%	4%	40%	24%	13%	18%	4%
Unsustainable infrastructure and innovation	34%	23%	13%	24%	6%	33%	23%	12%	25%	8%
Income inequality	32%	29%	14%	20%	5%	37%	30%	13%	15%	4%
Building safe, resilient and sustainable cities	30%	21%	13%	32%	4%	29%	21%	13%	31%	7%
Responsible use of resources and recycling	30%	24%	19%	25%	3%	30%	24%	18%	24%	4%
Climate change	37%	23%	16%	19%	4%	43%	22%	15%	16%	4%
Ocean pollution	38%	25%	16%	18%	3%	43%	25%	15%	13%	4%
Protection of land, forests and biodiversity	35%	25%	16%	20%	3%	40%	26%	14%	17%	4%
Promoting peaceful and inclusive societies	30%	23%	14%	30%	4%	31%	22%	14%	28%	5%
Global partnerships to support sustainable development	-	-	-	-	-	30%	18%	13%	31%	9%

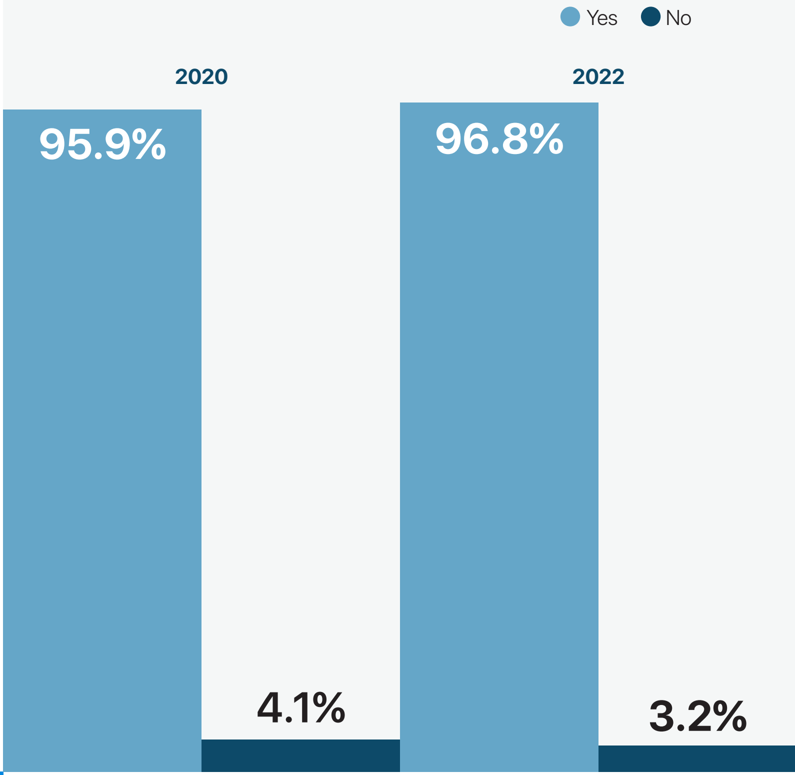
Focus on climate change

We believe it's happening

The study shows that overwhelmingly, across all 11 markets, people believe that climate change is a reality, with just a very small minority (3.2%) saying they do not believe it. This was the most definitive response we received to any question, 96.8% of people believe it is happening, a marginal increase as compared to 95.9% in 2020.

This contradicts the narrative that there is a high number of climate change sceptics, very few people do not believe, or outright deny climate change is happening. However, the survey shows you can believe in climate change, but not be worried about it. Baby boomers having the highest level of scepticism of climate change, with 5% of respondents in that generation not believing in it, compared to an average of 3.2%.

Do you believe in climate change?



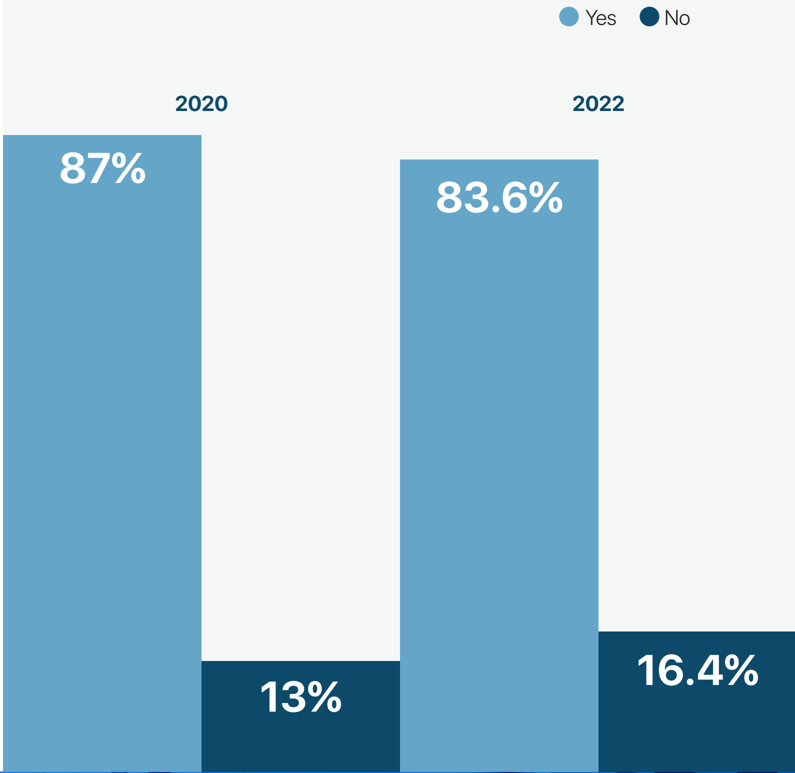
Climate change comes second only to poverty as the issue consumers are most concerned about in 2022, and while the number of people who are concerned about it saw the second largest rise, up 6% to 43%, they are still in a minority. The rate of growth reflects growing levels or concern among consumers on issues related to economic uncertainty, with only hunger and malnutrition around the world, seeing a greater rise in concern up 8% to 36%.

Reluctance to change behaviours

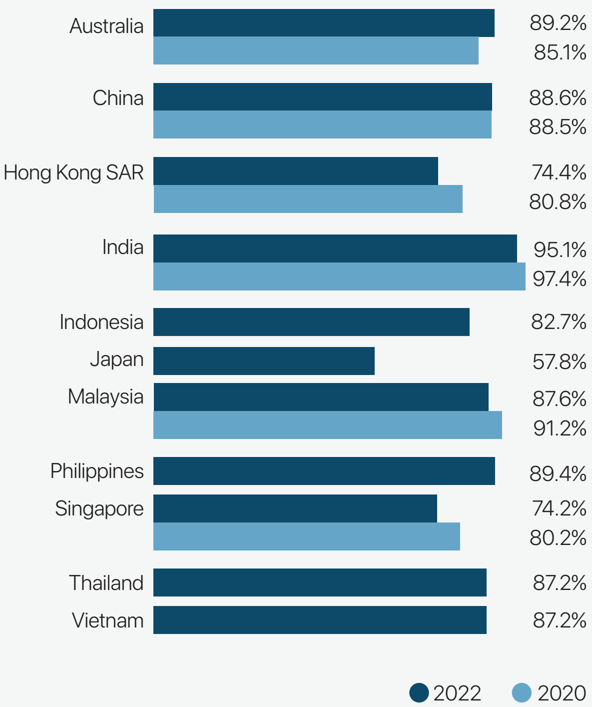
In what appears a contradictory finding, alongside the growing consumer belief in climate change, when it comes to single-use plastics, the trend moved in the opposite direction. In 2020 87% of people believed single use plastics should be banned, but this fell by 3.6% to 83.6% in 2022.

We also saw significant differences between markets on this question. In India, the vast majority of people (95.1%) agreed that a ban on single-use plastics would be a good move. However, in Japan, this question received a lukewarm response, with only 57.8% agreeing it would be a good move.

Should single use plastics be banned?



Agreement that single use plastics should be banned (2020 & 2022)



It was also notable that in some markets such as Singapore and Hong Kong SAR, there was a greater decrease, with more than 5% fewer people agreeing with a ban on single use plastics compared to two years ago. This may be a consequence of the pandemic, which has seen single use plastic play an important role in testing kits and masks. Anecdotal evidence points to a growing takeaway culture also potentially being a factor, as people value short term convenience over long- term impact on the planet.

There was one market which did see an increase in the belief that single use plastics should be banned, in Australia, 89.2% of people now believe this, up 4.1% from 2020.

Who should be responsible for delivering sustainability?

Consumers across the region are clear on who they believe is most responsible for addressing sustainability. The vast majority see governments (90.6%) and companies (85.2%) as the two groups responsible for delivering economic, environmental, and social sustainability. The belief is getting stronger in relation to government, with over two thirds of people (67.5%) feeling that governments are **very responsible**, up 6.4% since 2020, as opposed to just over a third (36.8%) of people saying the same about publicly listed companies, broadly unchanged versus 2020.

The growth in the belief that governments are **very responsible** most likely reflects the critical role they have played during the pandemic, and the view among consumers that governments play a vital role in addressing the large, complex challenges facing their communities and humanity more widely.

How responsible is each of the following groups for ensuring and promoting future economic, environmental, and social sustainability?

	2020					2022				
	Very responsible	Responsible	Somewhat responsible	Not responsible	Don't know	Very responsible	Responsible	Somewhat responsible	Not responsible	Don't know
Government	60.9%	28.9%	8.5%	1.3%	0.3%	67.5%	23.1%	7.1%	2%	0.3%
Private sector companies – publicly listed	36.7%	48.6%	12.0%	2.2%	0.4%	36.8%	48.4%	12%	2.2%	0.6%
Private sector companies – not publicly listed	31.7%	47.8%	17.4%	2.5%	0.6%	29.9%	45.4%	20.1%	3.7%	0.9%
NGOs	31.7%	47.8%	17.4%	2.5%	0.6%	28%	44.9%	20.9%	3.6%	2.6%
Media	37.2%	41.4%	16.9%	3.5%	1.0%	39.1%	37.4%	18.6%	3.7%	1.3%
General public / individuals	38.0%	42.7%	16.7%	2.1%	0.6%	37.6%	38.8%	19%	3.5%	1.1%

What should countries and businesses prioritise

We have a seen an increase in people's concern about climate change, and this has come with evolving views on whether countries and businesses should prioritise environmental protection over economic growth and profit margins.

When asked if countries should prioritise environmental protection over economic growth and profit margins, the short answer is no. Over the last two years consumers views have not changed. The survey shows that 60.2% of people across Asia Pacific feel countries should prioritise environmental protection over economic growth, a negligible change from 2020. This is remarkably consistent, given the changes we have seen in other measures.

However, when asked if businesses should prioritise environmental protection or profit margin, we have seen more of a shift, with an increase in those who think environmental protection should be prioritised over the profit margin, up 1.4% to 66.3%. While this is not statistically significant it does reiterate the expectations consumers have of companies and how they communicate their purpose will become increasingly important.

It is also notable that more respondents find countries prioritising economic growth to be reasonable (39.8%), while fewer (6.1% lower) feel the same way about businesses (33.7%).

What should countries prioritise – economic growth or environmental protection?

	Economic growth	Environmental protection
2020	39.9%	60.1%
2022	39.8%	60.2%

What should businesses prioritise – profit margin or environmental protection?

	Profit margins	Environmental protection
2020	35.1%	64.9%
2022	33.7%	66.3%

Contribution to environmental sustainability

Who do we believe is contributing the most to environmental sustainability in our markets? While governments are highly rated, the **general public/ individuals** and **privately held companies** are perceived to be contributing least to environmental sustainability, with 26–28% of respondents considering them to be underperforming.

Government actions in addressing sustainability are positively received by respondents and they continue to be seen as making the strongest contribution to environmental sustainability across the region, with over half (54%) of people believing this and it is the only segment receiving a more positive than negative rating. This is compared to unlisted private companies where just over a third (38%) of people believe they are making a strong contribution.

Consumers see themselves as the group which is underperforming the most in terms of environmental sustainability across the region.

In terms of generational differences, Baby boomers are the most critical of all groups' performance and contribution, including the **general public/individuals** performance, with 35% considering them to be underperforming, 7% higher than average.

How do you think each group is performing or contributing to 'environmental' sustainability in your country?

	2020					2022				
	Very strong	Strong	Satisfactory	Under performing	Don't know	Very strong	Strong	Satisfactory	Under performing	Don't know
Government	27%	25%	23%	24%	1%	29%	25%	21%	24%	1%
Private sector companies – publicly listed	14%	28%	28%	28%	3%	15%	31%	29%	22%	3%
Private sector companies – not publicly listed	15%	22%	29%	31%	4%	14%	24%	31%	26%	5%
NGOs	15%	26%	32%	21%	6%	14%	30%	33%	17%	6%
Media	16%	24%	30%	27%	3%	16%	26%	30%	24%	4%
General public / individuals	15%	22%	30%	29%	3%	16%	23%	28%	28%	4%

Who has the power to make real changes?

It is apparent who consumers think is responsible for promoting and progressing sustainability, but who do they believe has the power to actually make it happen and to bring about change?

The response was clear: they believe Government Officials and Ministers hold the most power to make the changes needed, this group ranked first with 81% of respondents saying they had the most power. This is a significant increase from 2020, when they scored 74%. They were closely followed this year by Heads of State, with 73%.

From a business perspective, two fifths of consumers believe CEOs hold this responsibility as well, but consumers do not believe they themselves hold much power, with just 14% of respondents believing they are the most important group, roughly the same amount as Charitable/NGO Leaders (18%).

Which individuals you believe hold the most power to ensure and promote future economic, environmental, and social sustainability in your country?

	Percentage (Ranked in top 3)	
	2020	2022
Government Officials	74.3%	81.2%
Head of State	70.5%	73.0%
CEOs	44.4%	43.6%
Recognised experts	31.7%	33.4%
Media	21.6%	19.8%
Charitable / NGO leaders	16.9%	17.8%
Consumers	16.4%	14.1%
Celebrities	10.1%	6.4%
Online influencers	7.8%	6.1%
Religious leaders	6.2%	4.7%

The perceived power of celebrities, online influencers and religious leaders is much lower, they are seen as holding the least power, expectation of celebrities holding this power dropped (-3.7%) from 2020.

These findings highlight changing consumer perceptions towards governments, brought about by their integral role during the pandemic, from implementing lockdowns, defining new rules for social engagement, as well as supporting and implementing the vaccine response. The pandemic has been the perfect example of the importance of public policy and the convening power of government in defining strategies to address major crises, deploying the right resources and mobilising society to act for the benefit of all.

How are different groups performing, across economic and social sustainability in the region?

We asked consumers which groups they believe are contributing most to the economic sustainability of their country? Overall, governments are seen by more people as both the strongest contributors to economic sustainability, as well as the most significant underperformers.

This illustrates a divided view on the performance of governments, with nearly a third of people (31%) saying they are making a very strong contribution, while at the other extreme, almost a similar number (22%) believing they are underperforming. Other groups were less polarising on this topic, with all of them having higher scores in the satisfactory measure and lower scores at the extremes.

The majority (56%) of consumers believe that governments across the region are performing either strongly (27%) or very strongly (29%) in contributing to social sustainability. This is much higher than the second-best performing group, publicly listed private companies (49%).

How well do you think each group is performing or contributing to 'economic' sustainability in your country?

	2020					2022				
	Very strong	Strong	Satisfactory	Under performing	Don't know	Very strong	Strong	Satisfactory	Under performing	Don't know
Government	31%	27%	21%	21%	1%	31%	25%	20%	22%	1%
Private sector companies – publicly listed	16%	32%	26%	23%	2%	16%	35%	30%	16%	3%
Private sector companies – not publicly listed	15%	25%	30%	25%	4%	15%	29%	32%	20%	5%
NGOs	14%	27%	35%	18%	6%	13%	30%	34%	17%	7%
Media	16%	25%	31%	25%	3%	16%	27%	30%	23%	4%
General public / individuals	16%	24%	31%	23%	5%	16%	24%	31%	23%	5%

How do you think each group is performing or contributing to 'social' sustainability in your country?

	2020					2022				
	Very strong	Strong	Satisfactory	Under performing	Don't know	Very strong	Strong	Satisfactory	Under performing	Don't know
Government	26%	27%	24%	22%	2%	29%	27%	22%	21%	1%
Private sector companies – publicly listed	14%	29%	33%	21%	3%	16%	33%	32%	17%	3%
Private sector companies – not publicly listed	15%	24%	34%	24%	4%	15%	27%	35%	19%	4%
NGOs	14%	26%	35%	19%	6%	14%	31%	33%	16%	6%
Media	16%	23%	33%	24%	4%	17%	26%	30%	22%	4%
General public / individuals	14%	23%	36%	22%	5%	16%	25%	34%	19%	6%

Which sectors are most admired for being responsible and trustworthy

As well as comparing corporates to other audiences, we also examined the perception of different vertical and commercial sectors with consumer audiences. Our findings show that most consumers believe that companies do not do much more than required by local regulators. Healthcare companies are considered the most responsible, with 26% of respondents believing they are 'very responsible', going above and beyond what is required by regulators.

The biggest improvement in perception has been for the **Consumer Products, which saw an uplift of 2.9%** from 21.7% in 2020 to 24.6% in 2022 **for being 'very responsible'**.

Sector	2020 Very responsible	2020 Responsible	2022 Very responsible	2022 Responsible
Consumer Products	22%	40%	25%	42%
Education	24%	46%	23%	44%
Government & Public Service	21%	40%	23%	38%
Healthcare	24%	44%	26%	43%
IT, Technology & Telecommunications	23%	47%	23%	47%

Unsurprisingly given news and reporting on their environmental impact, **mining companies** are considered **the most irresponsible**, with **16%** of respondents believing they will meet regulatory requirements but are likely to take advantage of and bend rules, a figure which is **nearly two times higher than all other sectors surveyed**.

More than one in ten consumers believe the worst performing sectors are irresponsible or non-compliant when it comes to regulation. A higher percentage of consumers see these as irresponsible or non-compliant – in order, they are **mining** (21%), **government and public service** (14%), **energy** (11%), **financial services** (11%), and **construction and engineering** (11%). Interestingly, given positive consumer perception of their power and ability to bring about change, the government and public service sector is ranked second worst in this respect.

Impact of the pandemic

One of the areas we wanted to understand was how the COVID-19 pandemic has changed the public's understanding of social and environmental responsibility. Our results have shown that Millennials have experienced the largest increase in interest in both social and environmental responsibility due to COVID-19, with 85% saying the pandemic piqued their interest in these topics.

If we accept the new regulations and changes to our consumption habits that will have to be come into effect in order to deliver the net zero target by 2050, the experience of COVID-19 can be seen as a dry run for asking people to make changes to their lives that they don't want to make.

One thing the pandemic has reminded us all of, is that sometimes, we have to make changes and compromises in our personal lives that are in the interests of the greater good. Climate change is probably going to be the most important example of this that humanity has faced. We will have to pay more for renewable energy, out of season fruits and vegetables may not be as readily available, we will have to contribute to insulating the buildings we live in and how we consume and manage energy will require a fundamental re-think.

Recommendations

Drawing on our comparison across different issues in the past two years, provides recommendations on what governments and companies can do further to improve their sustainability efforts, to meet the public's expectations on sustainability and ESG.

Overall recommendations for communicators:

- **We all have a role to play**
  Growing polarisation means all organisations must work hard to get their message across, if your sector or organisation is not seen as contributing, then not communicating is going to hold back your reputation even more. We all have a role to play in improving consumer perceptions.

- **What are you doing to address climate change and sustainability?**
  Organisations need to be clear on what they are doing in terms of social, economic and environmental sustainability – more people than ever see climate change and related issues as important.

- **Talk about your purpose**
  COVID-19 helped to stimulate people's interests in environmental and social responsibilities. We expect this trend to continue to increase and how your organisation is communicating its purpose will only grow in importance.

- **Use the right language**
  When discussing sustainability and related issues, the language used should be easily understood and free of jargon.

- **Expect these trends to continue**
  Across the Asia Pacific region, people are more concerned about the key issues facing humanity than they were in 2020, for those in government, expectations have risen. Our expectation is this will continue over the next two years.

About Sandpiper

Sandpiper is an award-winning strategic communications and public affairs consultancy based in Asia Pacific and operating globally.

We use our shared experience to make sense of the challenges our clients face in times of change.

We draw on rich, data-driven insights and research to inform our advice and deliver measurable value.

We work as a single, global team, with one P&L. This allows us to serve our clients flexibly wherever they are in the world.

Our team are trusted advisors to industry leaders and market disruptors. We combine strong regional market understanding with global perspectives. Our deep specialist knowledge in the **health**, **technology**, **finance**, **professional services**, **consumer brands** and **energy and environment** sectors ensure we understand the challenges our clients face, can think creatively about their issues, and shape communications to achieve their business goals.

In 2021 Sandpiper was named the Fastest Growing Agency in Asia Pacific and Asia Pacific PR Consultancy of the Year by PRWeek Asia, and Best Corporate and Public Affairs Agency Asia Pacific and a Best Place to Work by PRovoke, as well as being shortlisted for Global Corporate and Financial Agency of the Year.

BEIJING
Suite 1105, Full Tower,
No. 9 Middle East 3rd Ring
Road, Beijing, PRC
+86 10 8591 0056

HONG KONG SAR
21/F, The Workst@tion,
43 Lyndhurst Terrace,
Central, Hong Kong SAR
+852 3114 6339

NEW ZEALAND
2/200 Market Street North,
Hastings, Hawke's Bay,
New Zealand
+64 21 0844 0939

SHANGHAI
No. 1229 Century Avenue,
6/F, Tower 1, Century
Metropolis, Shanghai, 200122
+86 15 5075 77095

SINGAPORE
#21-02, Prudential Tower,
30 Cecil Street, Raffles Place,
Singapore 049712
+65 6971 1099

SYDNEY
Level 4, 71 Walker Street,
North Sydney NSW 2060,
Australia
+612 9939 8220