23 March 2022

Trail to Net Zero for Singapore

Prepared for: salesforce

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Methodology

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- This study was conducted online between 28 February – 4 March 2022.

- The sample comprised 1,029 Middle Managers and above from small, medium and large businesses in Singapore.

- YouGov designed the questionnaire, a copy of which has been included in this report.

- Significant differences have been reported at the 95% confidence level.

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Key Findings

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Extent support or oppose country setting a net-zero emissions target by 2050 (Q1)

- Eight in ten (81%) managers support Singapore setting a net-zero emissions target by 2050 including more than four in ten (46%) who say they strongly support this action, while just 2% are opposed.

- Interestingly, Baby Boomers (85%) and Millennials (83%) are more likely than Gen X (74%) to support Singapore setting a net-zero emissions target by 2050.

- Managers from businesses with 100+ employees (88%) are more likely than those from businesses with less than 20 employees (73%) to support Singapore setting a net-zero emissions target by 2050.

- Similarly, middle managers (85%) are more likely than senior managers (77%) to support Singapore setting a net-zero emissions target by 2050.

Is Government doing enough to address climate change and achieve a net zero economy by 2050? (Q2_1)

- More than half (54%) of the managers surveyed believe Government should be doing more to address climate change and achieve a net zero economy by 2050, while four in ten (39%) think Government is doing enough and 8% are unsure.

- In contrast, managers from the education sector (69%) are more likely than managers in engineering, design or architecture (41%) to think Government should be doing more to address climate change and achieve a net zero economy by 2050.

Key Findings (continued...)

Are businesses in your industry doing enough to address climate change and achieve a net zero economy by 2050? (Q2)

- Two thirds (66%) of managers surveyed believe businesses in their industry should be doing more to address climate change and achieve a net zero economy by 2050, while just one in four (24%) think they are doing enough and 9% are unsure.

- Interestingly, Millennial managers (30%) are more likely than Gen X (21%) and Baby Boomer managers (18%) to think businesses in their industry are doing enough to address climate change and achieve a net zero economy by 2050.

- While, middle managers (72%) are more likely than senior managers and above (61%) to say they think businesses in their industry should be doing more to address climate change and achieve a net zero economy by 2050.

- Furthermore, managers from the technology (36%) and engineering, design and architecture sector (26%) are more likely than those working in education (9%) to think businesses in their industry are doing enough to address climate change and achieve a net zero economy by 2050.

Key Findings (continued...)

<u>Extent support or oppose Government providing subsidies and incentives to businesses for development of renewable energy technology (Q3)</u>

• More than eight in ten (83%) managers surveyed support Government providing subsidies and incentives to businesses for the development of renewable energy technology with as many as four in ten (40%) saying they strongly support this action.

• Managers who said they strongly support Singapore setting a net-zero emissions target by 2050, are more likely than those who only somewhat support this initiative, to say they strongly support Government providing subsidies and incentives to businesses for the development of renewable energy technology (68% compared to 17%).

• Not surprisingly, managers who believe technology has a very important role to play in helping achieve a net zero target by 2050, are more likely than those who think the role of technology is only slightly or somewhat important, to say they strongly support Government providing subsidies and incentives to businesses for the development of renewable energy technology (64% compared to 21%).

Key Findings (continued...)

<u>Would suppliers having a net zero target impact your likelihood of purchasing their products and/or services (Q4)</u>

- Interestingly, six in ten (61%) managers surveyed said if a supplying business had a net zero target, then it would make them more likely to decide to purchase their products/services.

- While just one in ten (10%) said it would make them less likely to purchase from them, one in four (25%) that it would have no impact and 4% that they are uncertain as to whether it would have an impact or not.

- Not surprisingly, managers who strongly support Singapore setting a net-zero emissions target by 2050 (79%) are more likely than those who only somewhat support (60%) this action to say if a supplying business had a net zero target, then it would make them more likely to decide to purchase their products/services.

<u>Perceived importance of the role of technology in helping achieve a net zero target by 2050 (Q5)</u>

- The majority (85%) of managers surveyed believe that technology will play an important role in helping achieve a net zero target by 2050 with more than four in ten (43%) saying the role of technology will be very important.

Key Findings (continued...)

Sectors that are thought to be doing the most to help meet and address a net zero target by 2050 (Q6)

- The sectors managers are most likely to list in the top three industries they think are doing the most to help meet and address a net zero target by 2050 are Energy (39%), Government (39%) and Technology and Communications (32%).

- Other sectors listed in managers top three with respect to action taken to help meet and address a net zero target by 2050 include Transport and Logistics (27%), Education (22%), Manufacturing (22%) and Agriculture (20%).

- Interestingly, younger managers 18-34 years are more likely than those 35-49 years and 50-64 years to include Technology and Communications (44% compared to 28% and 26%), Education (32% compared to 19% and 18%) and Health (26% compared to 15% and 12%) in their top three with respect to action taken to help meet and address a net zero target by 2050. In contrast, managers 50-64 years are more likely to include Transport and Logistics (34% compared to 24% 35-49 years and 20% 18-34 years).

- Middle managers are more likely than senior managers and above to include the Energy sector in their top three with respect to action taken to help meet and address a net zero target by 2050 (44% compared to 34%) while senior managers and above are more likely to include financial services (19% compared to 11%) and the hospitality sector (12% compared to 5%).

- Managers from large businesses with 100+ employees are more likely than those from small businesses with less than 20 employees to include Transport and Logistics in their top three industries doing most to help meet and address a net zero target by 2050 (34% compared to 24%), while managers from medium sized organisations with 20-99 employees are more likely than those with less than 20 employees to include Technology and Communications (46% compared to 27%).

- Furthermore, managers in the Manufacturing sector (45% compared to 22% overall) and Construction sector (26% compared to 11% overall) are more likely to list the sector they work in, in their top three sectors that are doing the most to help meet and address a net zero target by 2050.

Key Findings (continued...)

Who has the most responsibility to tackle climate change? (Q7)

• When it comes to tackling climate change, more than four in ten (44%) believe that Government has the highest level of responsibility followed by international organisations such as the United Nations and the World Bank (18%) and businesses (16%).

• Surprisingly, just 7% of managers believe environmental organisations/NFPs have the greatest responsibility to tackle climate change, while 9% assigned most responsibility to the general community/residents of a country.

• Baby Boomer (50%) and Gen X managers (48%) are more likely than Millennials (38%) to believe Governments have the greatest responsibility to tackle climate change.

• Similarly, managers in the Construction sector (59% compared to 44% overall) are more likely to believe Governments have the greatest responsibility to tackle climate change.

• While Large businesses with 100+ employees are twice as likely as small businesses with less than 20 employees to think environmental organisations have the greatest responsibility to tackle climate change (11% compared to 5%).

Key Findings (continued…)

Beliefs about the impact of achieving a net zero economy by 2050 on the total number of jobs in the economy (Q8)

- Managers are three times as likely to think that achieving a net zero economy by 2050 in Singapore will result in more jobs than less jobs (39% compared to 13%), while a third (33%) believe there will be no impact and 15% are unsure how the number of jobs will be impacted.

- Similarly, Millennial managers (45%) are more likely than Gen X (30%) and Baby Boomer managers (31%) years to believe that achieving a net zero economy by 2050 in Singapore will result in more jobs.

- Moreover, managers from businesses with 20-99 employees (52%) and 100+ employees (42%) are more likely than businesses with less than 20 employees (31%) to believe that achieving a net zero economy by 2050 in Singapore will result in more jobs.

Salesforce_Sustainability-Net-Zero

Base: All Residents 18+
Question type: Pdl
#Question display logic:
if pdl.employment_status_au.last > months(9) and updated

[employment_status_au] Which of these applies to you?

<1>   Working full time (30 or more hours per week)
<2>   Working part time (8-29 hours a week)
<3>   Working part time (Less than 8 hours a week)
<4>   Full time student
<5>   Retired
<6>   Unemployed
<7>   Not working
<8>   Other

*#skip logic: **If Full time student or Retired or Unemployed or Not working or Other, is selected, skip to End of Survey (screenout)***

Base: Workers 18+
Question type: Pdl
#Question display logic:
if pdl.management_level.last > months(9) and updated

[management_level] What level of management responsibility do you hold in your current position?

<1>	Owner/ Proprietor	<8>	Other senior manager or director below board level
<2>	Partner	<9>	Middle manager
<3>	Chairperson	<10>	Junior manager/ team leader/ supervisor
<4>	Chief Executive	<97>	Other
<5>	Managing Director	<99>	Not applicable - I don't have any management responsibility
<6>	Non Executive Director	<98 if 0>	Not applicable - I don't work
<7>	Other board level manager/ director		

*#skip logic: **If Junior manager/ team leader/ supervisor is selected, skip to End of Survey (screenout)***
#Or If Other is selected, skip to End of Survey (screenout)
#Or If Not applicable - I don't have any management responsibility is selected, skip to End of Survey (screenout)
#Or If Not applicable - I don't work is selected, skip to End of Survey (screenout)

[business_size] Including yourself, approximately how many full-time employees are employed by your organisation in total in the country?

<1>	1 (just me)	<8>	50 to 99
<2>	2	<9>	100 to 249
<3>	3 to 5	<10>	250 to 499
<4>	6 to 9	<11>	500 to 999
<5>	10 to 19	<12>	1,000 or more
<6>	20 to 34	<13>	Don't know
<7>	35 to 49	<99 if 0>	Not applicable

[work_industry] Regardless of the particular job that you do, in what industry does your company work?

<30>	Accounting	<4>	Manufacturing: Automobiles or automobile-related
<1>	Agriculture (farming, livestock)	<5>	Manufacturing: Heavy industry or machinery
<25>	Airlines or air travel	<6>	Manufacturing: Technology, computers, electronics
<24>	Hotels or lodging	<7>	Manufacturing: All other
<26>	Other travel services	<9>	Media and communications
<22>	Arts, entertainment, and recreation	<2>	Natural resources (e.g. oil, mining, forestry)
<13>	Business services (e.g., accounting, consulting, advertising, business or market research)	<19>	Personal care and services
<3>	Construction	<14>	Real estate
<20>	Education	<23>	Restaurant services
<17>	Engineering, design, or architecture	<27>	Retail
<10>	Financial Services: Banking	<15>	Scientific research
<12>	Financial Services: Brokerage & Investment	<16>	Technology services
<11>	Financial Services: Insurance	<28>	Transportation
<31>	Financial Services: Other	<8>	Wholesaling
<21>	Health or medical services	<97 fixed>	Other
<18>	Law or legal services	<98 fixed xor>	Don't know
<29>	Maintenance and repair	<99 fixed>	Not applicable

[work_sector] What kind of organisation do you work for?

<1>	Private sector – profit-seeking (e.g. public limited company, partnership)
<2>	Public sector – government owned or funded (e.g. civil service, local government, university)
<3>	Third sector – non-profit, non-governmental (e.g. charity, NGO, social enterprise)
<98 fixed xor>	Don't know
<99 fixed xor>	Not applicable

[SF_Q1] The purpose of this survey is to gauge business leaders' attitudes to sustainability and actions being taken to address climate change in your country.

Thinking firstly about emissions targets, to what extent do you support or oppose your country setting a 'net-zero' emissions target by 2050? Net zero refers to a state in which the greenhouse gases going into the atmosphere are balanced by removal out of the atmosphere.

Please select one option only

<1>	Strongly support
<2>	Somewhat support
<3>	Neither support nor oppose
<4>	Somewhat oppose
<5>	Strongly oppose
<6>	Don't know

[SF_Q2] Thinking now about the actions being taken to address climate change and to achieve a Net Zero economy by 2050, do you think your government and businesses in your industry are doing enough or should they be doing more?
Please select one option per row

-[SF_Q2_1]	Your government
-[SF_Q2_2]	Businesses in your industry
<1>	Yes, I think they are doing enough
<2>	No, I think they should be doing more
<3 fixed>	Don't know

Base: Middle managers and above 18+
Question type: Single

[SF_Q3] To what extent do you support or oppose the Government providing subsidies and incentives to businesses for the further development of renewable energy technology?
Please select one option only

<1>   Strongly support
<2>   Somewhat support
<3>   Neither support nor oppose
<4>   Somewhat oppose
<5>   Strongly oppose
<6>   Don't know

Base: Middle managers and above 18+
Question type: Single
#row order: randomize

[SF_Q4] Thinking now about how you choose your suppliers for the products and services your business requires. If a supplying business had a net zero target would it make you more likely, less likely or would it have no impact on your decision to purchase their products/services?
Please select one option only

<1>   More likely
<2>   Less likely
<3 fixed>   No impact
<4 fixed>   Don't know

Base: Middle managers and above 18+
Question type: Single

[SF_Q5] In your opinion, how important is the role of technology in helping achieve a net zero target by 2050?
Please select one option only

<1>   Very important
<2>   Somewhat important
<3>   Slightly important
<4>   Not at all important
<5>   Don't know

[SF_Q6] In your opinion, which of the following sectors are doing the most to help meet and address a net zero target by 2050?
Please select three options

<1>	Government	<8>	Agriculture
<2>	Technology & Communications	<9>	Retail
<3>	Financial Services	<10>	Manufacturing
<4>	Health	<11>	Transport & Logistics
<5>	Education	<12>	Construction
<6>	Energy	<13>	Travel
<7>	Mining	<14>	Hospitality

<15>Don't know

[SF_Q7] In your opinion, which of the following organisations have the most responsibility to tackle climate change?
Please rank the following organisations in order of responsibility from 1 to 5 where 1 is the highest level of responsibility

<1>	Businesses
<2>	Governments
<3>	International organisations (e.g. United Nations, World Bank)
<4>	Environmental organisations (Non-government)
<5>	Community/residents of a country

<6>Don't know

[SF_Q8] In your opinion, will achieving a Net Zero economy by 2050 in your country result in more jobs, less jobs or will it have no impact on the total number of jobs in the economy?
Please select one option only

<1>	More jobs
<2>	Less jobs
<3 fixed>	No impact (i.e. the number of jobs lost will be balanced by the number of jobs created)
<4 fixed>	Don't know

Thank You

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