2025 SEC Newgate Impact Monitor:

MANAGING REPUTATIONAL RISK AND OPPORTUNITY IN A FRAGMENTED WORLD

UK REPORT

Insight. Communications. Advocacy.

Contents

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Foreword

SEC Newgate's 2025 Impact Monitor comes at the end of a turbulent 12 months.

In 2025, we saw a period of rapid corporate strategy reset as business sought to re-frame its mission and strategy in the wake of Donald Trump's inauguration as 47th President of the United States. A period that saw growing cynicism around ESG, criticism of DEI and sustainability initiatives and a re-set on global trade relations. It has also seen populist political parties polling highly across Europe and setting the terms for the political debate.

Inevitably, this turmoil and change has impacted public perceptions of business and our Impact Monitor makes it clear the UK public is far from unanimous in its expectations of business impact. For some, financial stability and pragmatism are paramount; for others, authenticity, local operations, and taking a bold stance on values are non-negotiable. This expectation becomes increasingly pressing for younger generations.

Good corporate reputation continues to be defined by positive, tangible and authentic impact as much as it is by strong financial performance. Big picture, global commitments are often viewed with suspicion as potential agents for greenwash; the public seek proof, local action and consistency.

For business this brings a delicate balancing act and a need to move on from the reset of 2025. There is also a need to engage with a public whose expectations are fragmented and sometimes in tension. That will mean that 2026 is the year for balancing Sustainable Strategy with the issues that matter most: Clearly articulating a mission that reflects the need to manage environmental risk and demonstrates meaningful business impact to the public, investors and corporate partners who want a long-term plan, while also ensuring that business can have positive relations with politicians of many different hues.

In 2026, business will need to set out how it will overcome macro risks and capitalise on opportunities. Business will need to show how this sense of purpose can deliver impact to the bottom-line, to the planet and to the communities that surround it. Only then can business expect to be trusted and to protect its reputation in a world that will continue to be framed by enormous change and challenges.

Background & methodology

Now in its fifth year, SEC Newgate's Impact Monitor (previously the ESG Monitor) continues to track global community sentiment towards how corporates and governments are responding to ESG related challenges – and monitors how their actions are shaping community perceptions.

1,018

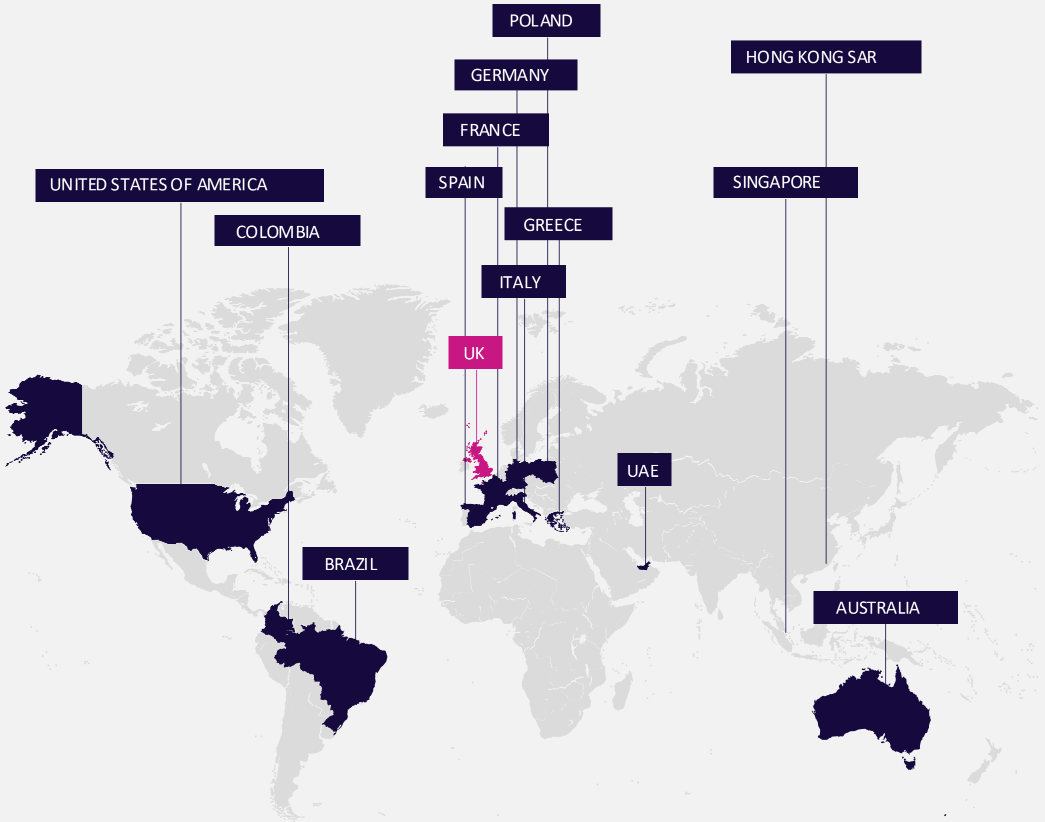
Sample of n=1,018 in **UK**

14,352

people surveyed across **14 countries and territories**

Participants were sourced from market research panels, with the survey translated and completed in-language where appropriate. Fieldwork was conducted over the period 4-29 July 2025.

Quotas were set by age, gender and location to ensure a nationally representative sample of citizens aged 18+, and the final results were weighted by the actual age and gender proportions within each country or territory. For the 'total' results, each country is given equal weighting.



Other notes

1. Survey questions and sample sizes are shown at the bottom of each page. Unless otherwise specified, questions were asked of all participants.
2. Results may not always total 100% due to rounding or questions allowing multiple-responses.

KEY INSIGHTS

1.

GEN Z ARE HIGHLY AMBITIOUS ABOUT WHAT ISSUES THE COUNTRY SHOULD BE ADDRESSING, FILTERING THROUGH TO THEIR EXPECTATIONS OF BUSINESSES.

Gen Z stands apart. This generation is demanding that the UK take meaningful action on a wide range of issues. This filters through to their expectations of businesses, regardless of size. Interestingly, this cohort are also more positive about current business impact.

For businesses, this indicates a generation who are expecting a lot from all businesses, and that businesses can anticipate heightened scrutiny from this cohort who are watching businesses more closely.

2.

THERE IS A BROAD DISCONNECT BETWEEN THE IMPORTANCE OF BUSINESSES MAKING A POSITIVE IMPACT, AND THE REALITY.

Compared to 2024, industries are perceived to be making progress in conducting themselves more responsibly. Yet, despite these gains, a significant gap remains between the importance of responsible business conduct, and what the UK public see in reality.

The UK public expect businesses to make greater strides towards responsible business conduct, and importantly, to engage more about what they are doing to make an impact.

3.

UNDERPINNING THIS DISCONNECT, BUSINESSES FACE AN ENVIRONMENT OF LOW TRUST IN MEDIA COMMUNICATIONS.

The lowest performing industries reveal a continuing disconnect between the public and the sources they use for information.

With the media and social media seen as performing as poorly as the mining and chemical industries, there is a clear opportunity for considered engagement.

KEY INSIGHTS

4.

THE UK PUBLIC PRIORITISE LOCAL OVER GLOBAL

The UK public want to see more local production and independence in the UK, with nearly half saying that the nation is too reliant on foreign workers, global supply chains and foreign ownership of companies based in the UK. This filters through into expectations of businesses: companies that operate locally and invest in their communities are gaining strong favour among the UK public.

Localisation resonates particularly with Reform voters. With Reform UK's growing popularity and the broader appeal of local action, businesses may want to consider how to act locally and communicate about local operations if they are seeking improved public perceptions.

5.

THE UK PUBLIC HAVE STRONG EXPECTATIONS OF BUSINESSES TO SPEAK OUT

Speaking out on environmental issues and values are particularly supported, signalling that the UK public expect businesses to communicate about their environmental impact, and to engage authentically.

However, age and political stance temper expectations. Gen Z and Green Party are more likely to support businesses speaking out on social issues, whilst Reform Voters are less likely to support speaking out on environmental issues and social issues if it will make a business unpopular with the government.

6.

THE UK'S IMPACT MONITOR REVEALS FOUR DISTINCT ENGAGEMENT PERSONAS WITHIN THE UK PUBLIC

There are four distinct attitudes-based segments in the UK, divided by their views on how businesses should conduct themselves.

These segments are divided by four key areas: idealism, pragmatism, globalism and protectionism. The research suggests that businesses must navigate these expectations carefully, balancing purpose with resilience. The challenge lies in aligning strategies and communications to resonate with different audiences without compromising authenticity or core objectives.

CHAPTER 1:

The key issues facing the UK

2 in 3 of the UK public believe the country is headed in the **wrong direction** - a significant, 5% increase from 2024.

68%

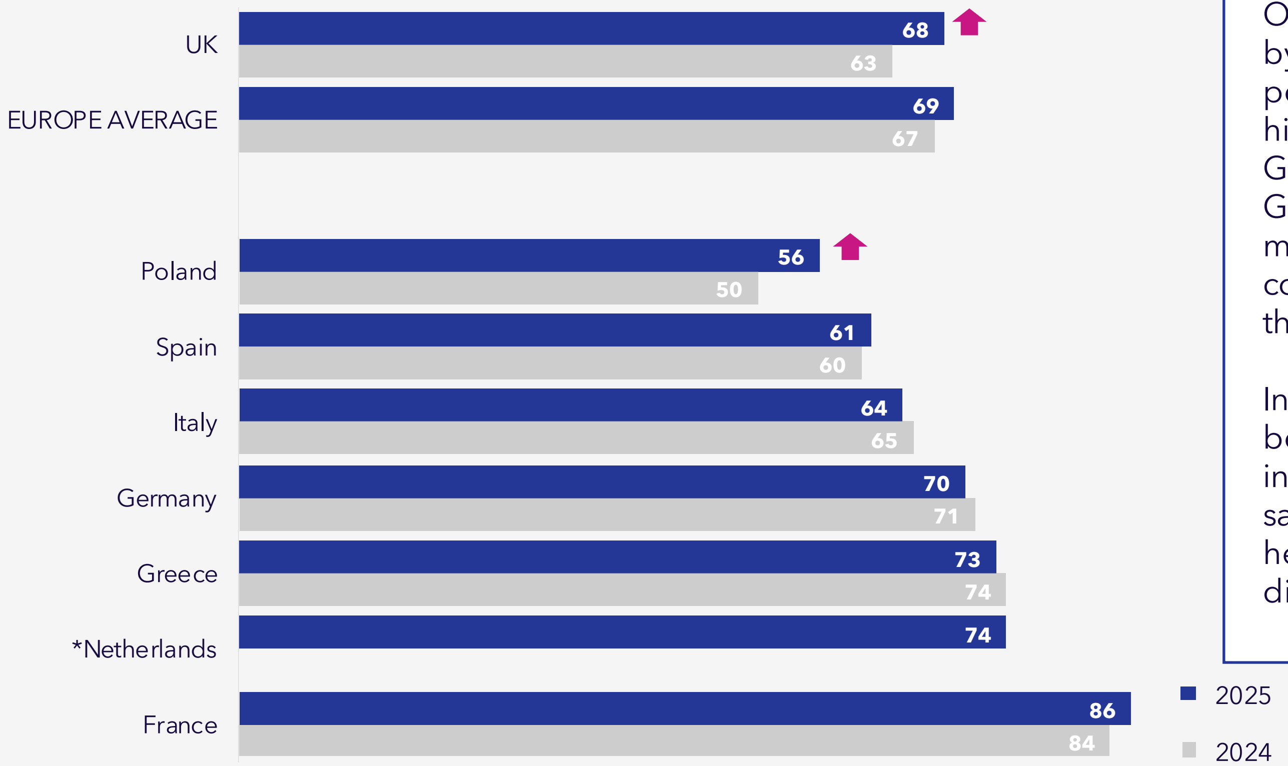
think the UK is heading in the **wrong direction**
UK

32%

think the UK is on the **right track**
UK

Perceived direction Europe is heading in

(% Who say it's heading in the wrong direction)



Opinions vary widely by country, with pessimism again the highest in France, Greece and Germany. Overall, the majority believe their country is heading in the wrong direction.

In the UK, there has been a significant rise in respondents saying the country is headed in the wrong direction.

Source: SEC Newgate Impact Monitor 2025 and 2024. Q1. Overall, do you think that things in the UK are heading on the right track or in the wrong direction? *Note: Netherlands were not apart of the global Impact Monitor in 2024. Base: 2025. UK respondents n=1,018 Europe respondents n=8,130, Poland respondents n=1,010, Spain respondents n=1,007, Italy respondents n=1,005, Germany respondents n=1,010, Greece respondents n=1,054, France respondents n=1,021 Base: 2024. UK respondents n=1,036 Europe respondents n=7,192, Poland respondents n=1,007, Spain respondents n=1,028, Italy respondents n=1,013, Germany respondents n=1,009, Greece respondents n=1,056, France respondents n=1,043

Denotes significantly **higher** / **lower** compared to 2024

In 2025, top issues continue to relate to more personal concerns of the UK public.

Regardless of generation or voting intention, the UK want to see the same top issues addressed.

However, Gen Z are unique in calling for the **improvement of pay and conditions for workers** as a top issue – with 84% saying it is an important issue to be addressed.

Importance of issues for the future of the UK

Issues of importance for the UK's future (TOP ISSUES) *(% Rated 7-10 on a 10-point scale)*	**Year-on-year trend**		
	2025	2024	2023
Ensuring quality, affordable healthcare for everyone	86	86	90
Addressing the rising cost of living	86	84	91
Ensuring secure and affordable food supplies	85	85	89
Strengthening the economy	85	86	87
Reducing crime and violence	82	81	84
Ensuring secure and affordable energy and fuel supplies	82	82	89
Managing data security and personal privacy	77	76	76
Ensuring quality, affordable education for everyone	77	78	83
Protecting the natural environment and wildlife	76	77	81
Strengthening the response to violence against women	74	75	79
Creating new job opportunities	73	75	80
Addressing housing affordability and availability	73	77	NA
Improving pay and conditions for workers	73	76	79

Source: SEC Newgate Impact Monitor 2025, 2024 & 2023.
Q19. The following are things that some people believe are important for the UK's future.
How important are these things to you personally? Base: 2025: UK respondents n=1,018 Gen Z n=240 Base: 2024. UK Respondents n=1,036, Base: 2023. UK Respondents n=1,009.

Managing the use of AI is seeing the strongest upward trend in importance.

Importance of issues for the future of the UK

Issues of importance for the UK's future (LOWER ORDER ISSUES) *(% Rated 7-10 on a 10 point scale)*	Year-on-year trend 2023	2024	**2025**
Strengthening support for people in vulnerable situations	76	75	**72**
Improving the country's defence capability	65	70	**72**
Investing to support local agriculture	NA	NA	**71**
Acting decisively to stop the use of forced and child labour	77	73	**71**
Addressing the deliberate spread of misinformation and "fake news"	NA	68	**71**
Investing to support local manufacturing	NA	72	**70**
Managing the impacts of wars	72	70	**69**
Transitioning to renewable/clean energy sources	73	71	**68**
Improving preparedness for extreme weather events	70	68	**67**
Better regulation of companies to prevent unethical behaviour	70	69	**67**
Improving respect between people and groups in the community	NA	67	**67**
Managing the use of Artificial Intelligence (AI)	59	63	**67**
Acting decisively on climate change	70	69	**66**
Promoting diversity and inclusion for minority groups	NA	NA	**56**
Increasing migration to address skill shortages	52	46	**45**

Source: SEC Newgate Impact Monitor 2025, 2024 & 2023.
Q19. The following are things that some people believe are important for the UK's future.
How important are these things to you personally? Base: 2025: UK respondents n=1,018 Base: 2024. UK Respondents n=1,036, Base: 2023. UK Respondents n=1,009.

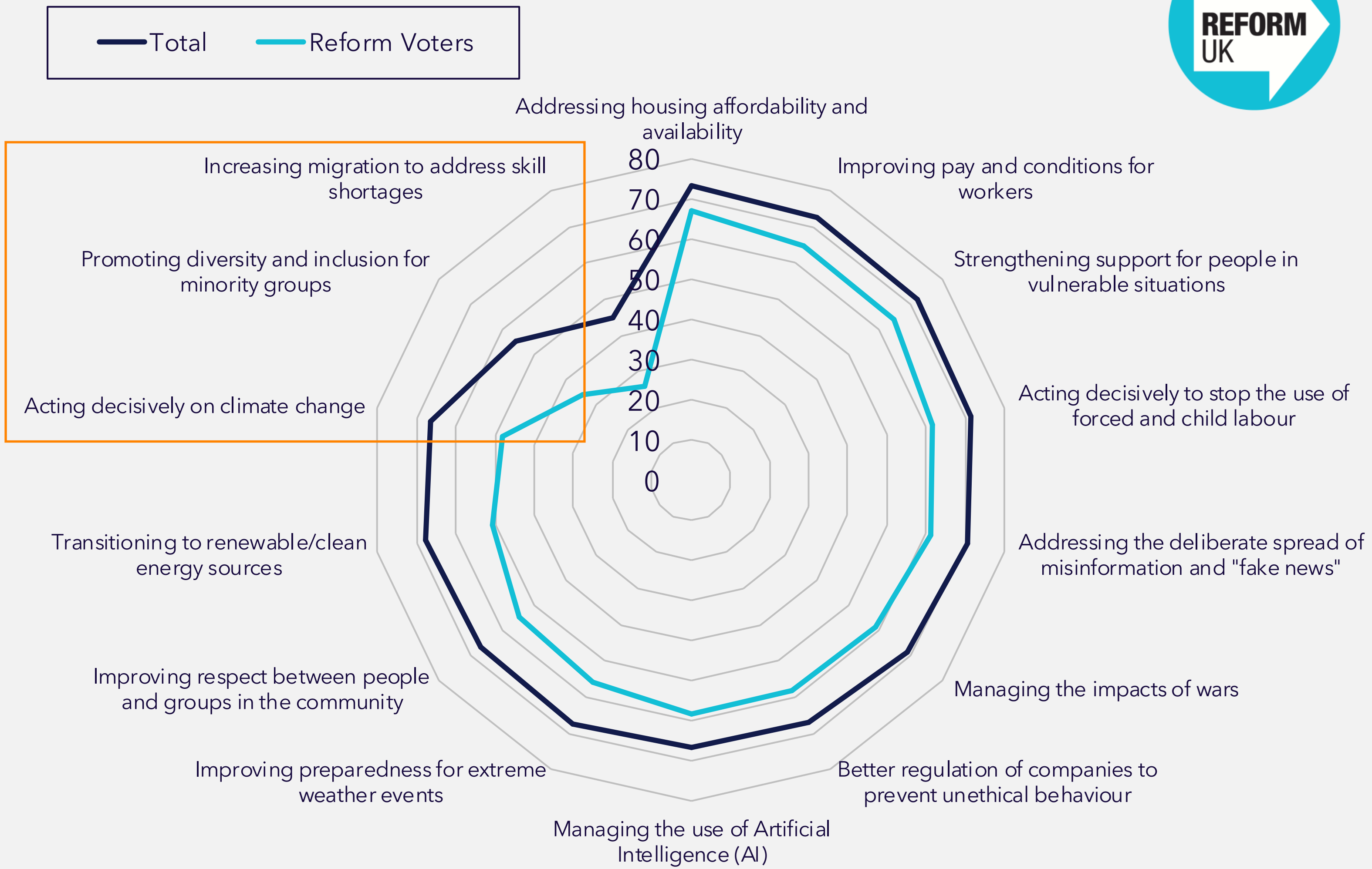
However, Reform voters place **significantly less importance** on social and environmental issues.

Whilst these three issues are the lowest at a total level, they are of significantly less importance amongst Reform Voters:

- Increasing migration to address skill shortages (26% vs 45% NET)
- Promoting diversity and inclusion for minority groups (34% vs 56% NET)
- Acting decisively on climate change (38% vs 66% NET)

Importance of issues for the future of the UK

Issues where Reform voters are significantly lower shown (NET 7 – 10 OUT OF 10)



Source: SEC Newgate Impact Monitor 2025.
Q19. The following are things that some people believe are important for the UK's future. How important are these things to you personally? Base: UK Respondents n=1,009, Those who intend to vote Reform UK in the next election n=223

It is Gen Z who are most ambitious about the issues that need addressing in the UK.

"Young people are more likely to be idealistic and think that radical change is both necessary and possible. They may not yet be stuck in the routinised and sterile life that work and age often bring, nor stuck in any kind of rigid way of thinking. They have great energy and can get things done…And what revolution has ever succeeded without youth?"

Michael Yates, Economist

Importance of issues for the future of the UK

Issues that Gen Z think it is **important** to address fall into a wide range of categories.

- Defence
- Economic
- Social
- Environmental
- Responsible business
- Workers rights
- Diversity and inclusion
- AI/Media regulation

Whilst other generations tend to have a more compact set of top issues they want to see addressed.

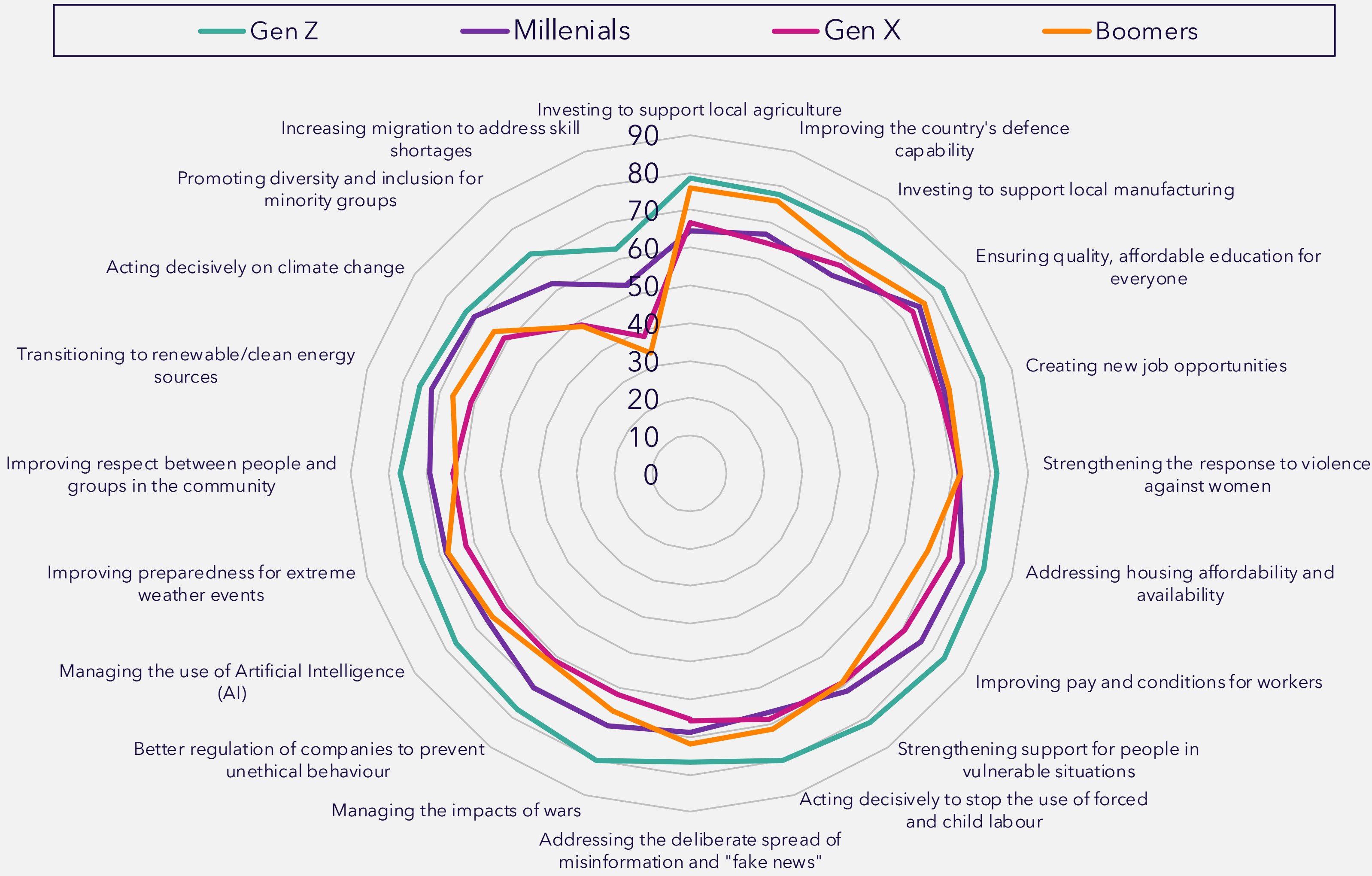
Gen Z's care deeply, demonstrating:

- Concern for their future
- Strong focus on social and ethical issues
- Higher expectations of government, society and business

Importance of issues for the future of the UK

Issues where Gen Z are significantly higher shown

(NET 7 – 10 OUT OF 10)



Source: SEC Newgate Impact Monitor 2025. Q19. The following are things that some people believe are important for the UK's future. How important are these things to you personally?
Base: Baby Boomers n=252, Gen X n=206, Millennials n=298, Gen Z n=240

CHAPTER 2:

Public perceptions of UK industries and business conduct.

Businesses face an environment characterised by low trust in media content.

The lowest performing industries reveal a continuing disconnect between the public and the sources they use for information. With the media and social media seen as performing as poorly as the mining and chemical industries.

Performance of industries in conducting business in responsible ways (NET 7 – 10 OUT OF 10)

LOWEST PERFORMING INDUSTRIES

Mining and resources

Social media platforms

Chemicals

Fashion

The media

Source: SEC Newgate Impact Monitor 2025. Q11. How would you rate the performance of the following industries operating in the UK when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations? Base: UK respondents n=1,018, Baby Boomers n=252, Gen X n=206

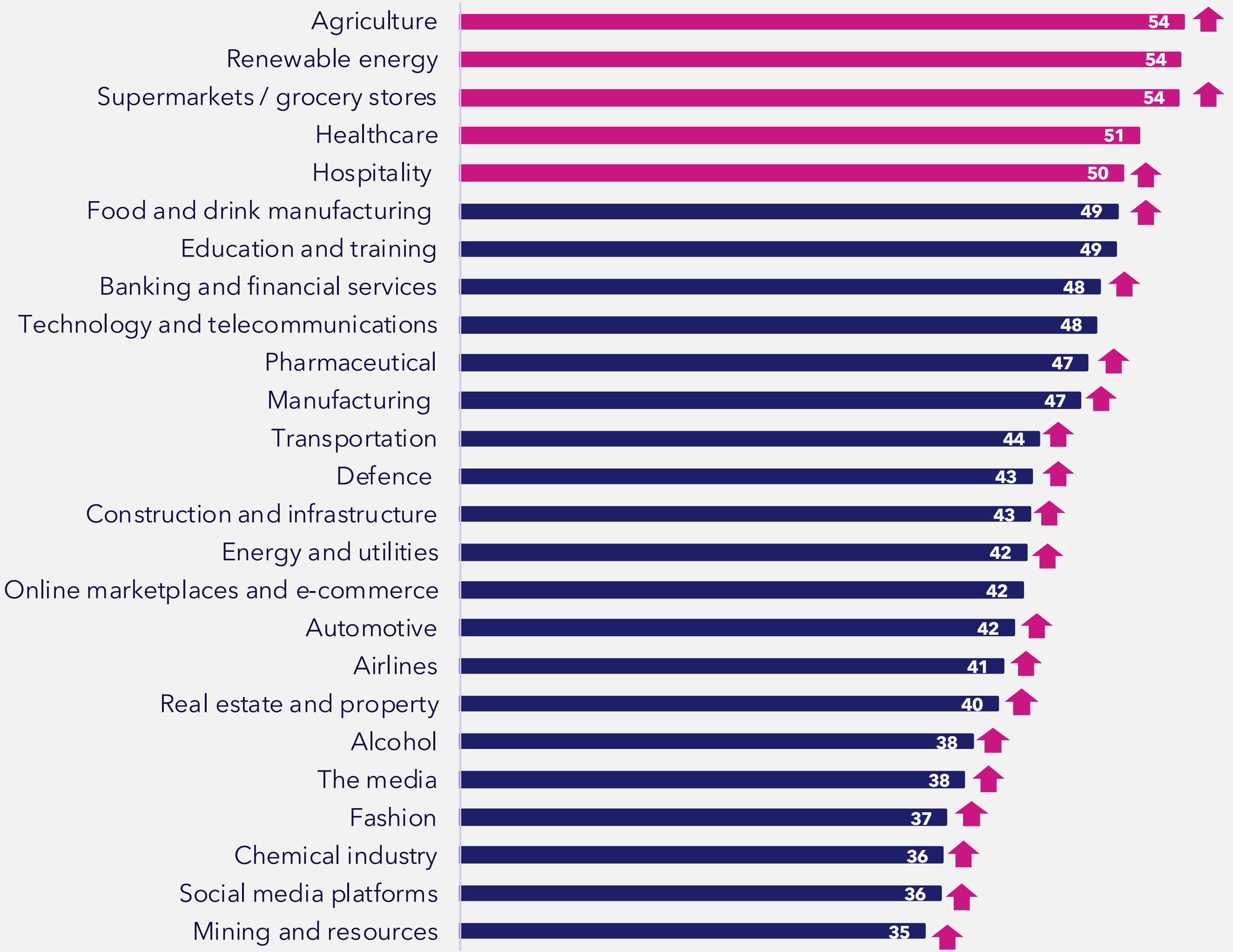
However, compared to 2024, perceptions of performance have increased significantly for all major UK industries.

TOP PERFORMING INDUSTRIES:

1. Agriculture
2. Renewable energy
3. Supermarkets / grocery stores
4. Healthcare
5. Hospitality (e.g. restaurants, hotels)

Performance of industries in conducting business in responsible ways

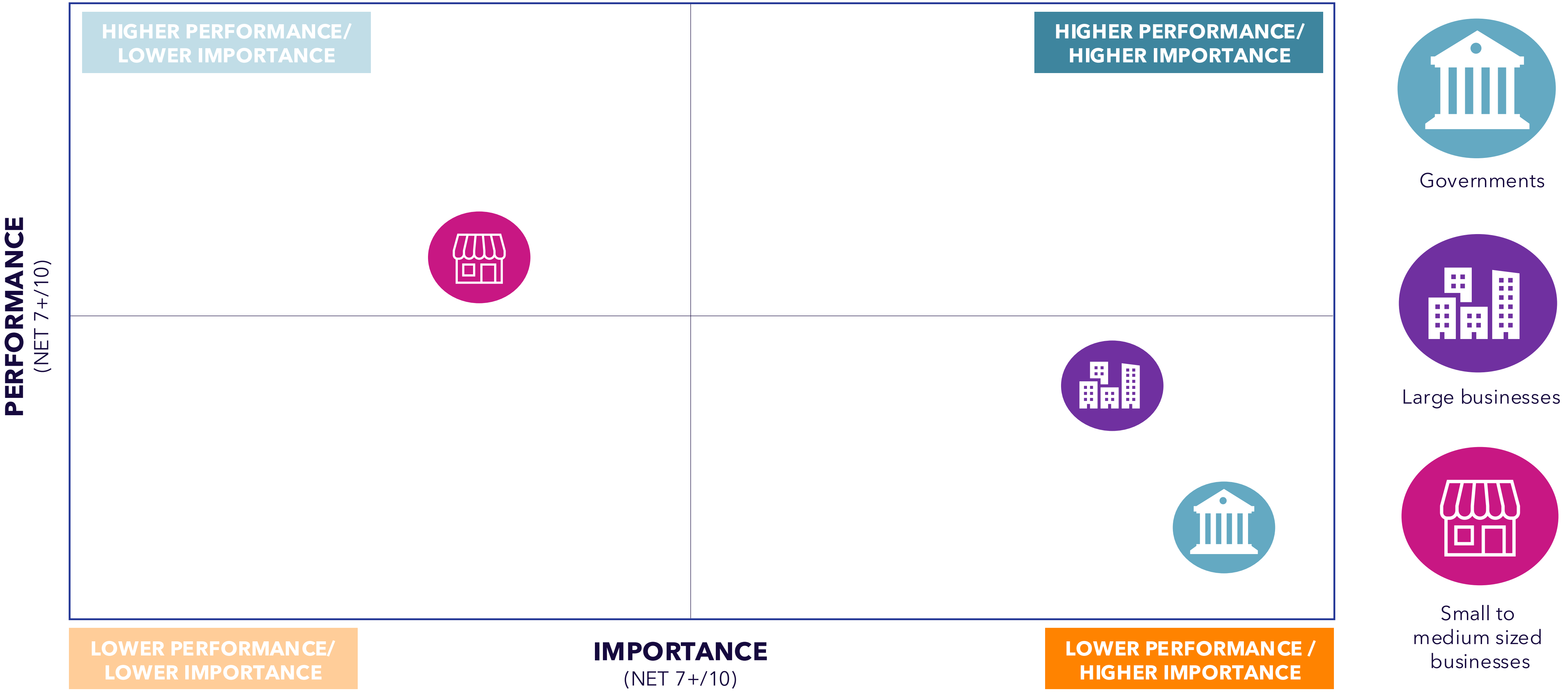
(NET 7 - 10 OUT OF 10)



Source: SEC Newgate Impact Monitor 2025. Q11. How would you rate the performance of the following industries operating in the UK when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations? Base: UK respondents n=1,018

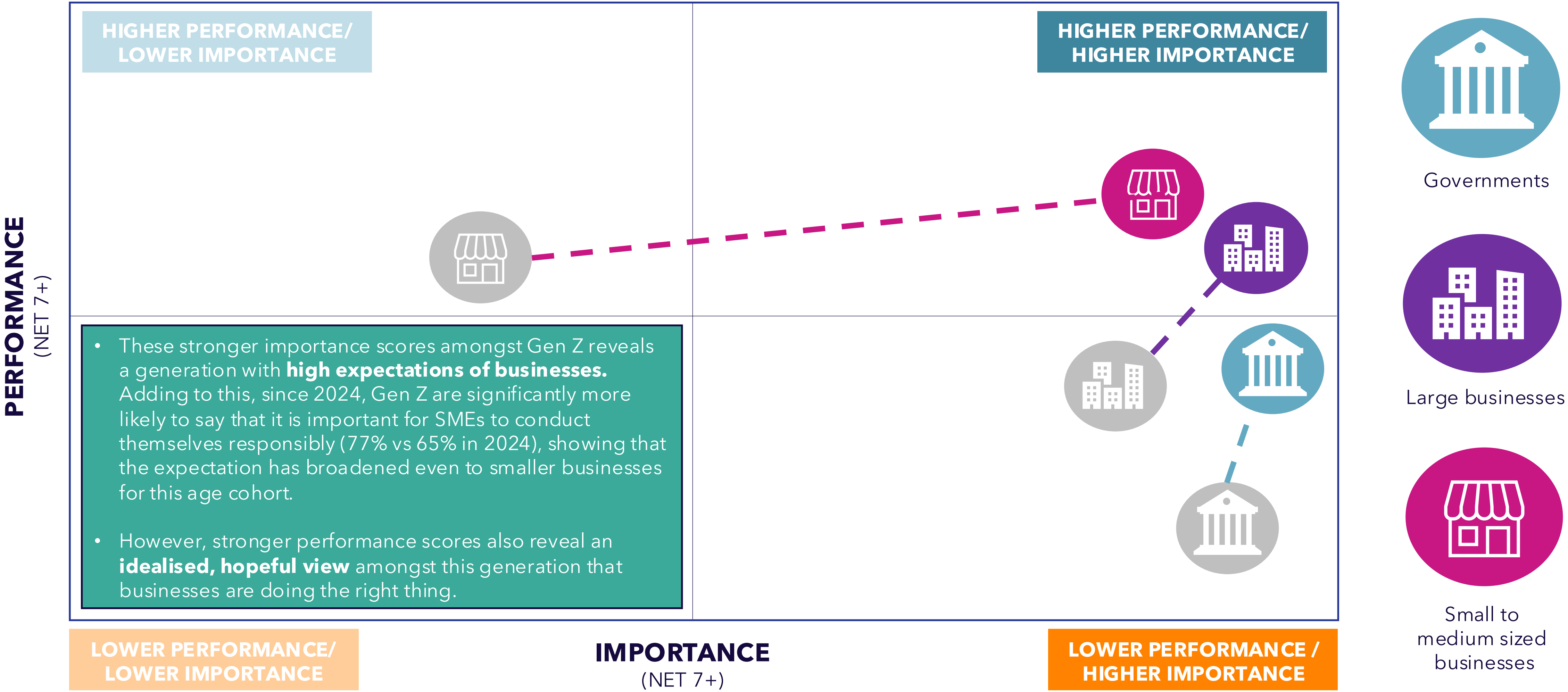
Denotes significantly **higher** / **lower** compared to 2024

Despite these improvements, the UK public are calling for large businesses and governments to conduct themselves more responsibly.



Source: SEC Newgate Impact Monitor 2025. Q23a. How important do you personally think it is for the following to conduct their business in responsible ways - in terms of their environmental, social and governance considerations? Q23b. Overall, how would you rate the performance of the following that operate in the UK when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations? Base: UK respondents n=1,018.

Gen Z hold stronger beliefs in the importance of responsible business, and notably, more positive perceptions of business performance.



- These stronger importance scores amongst Gen Z reveals a generation with **high expectations of businesses.** Adding to this, since 2024, Gen Z are significantly more likely to say that it is important for SMEs to conduct themselves responsibly (77% vs 65% in 2024), showing that the expectation has broadened even to smaller businesses for this age cohort.
- However, stronger performance scores also reveal an **idealised, hopeful view** amongst this generation that businesses are doing the right thing.

Source: SEC Newgate Impact Monitor 2025. Q23a. How important do you personally think it is for the following to conduct their business in responsible ways - in terms of their environmental, social and governance considerations? Q23b. Overall, how would you rate the performance of the following that operate in the UK when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations? Base: UK respondents n=1,018, Gen Z n=240

Year on year, perceptions of performance remains low - despite a significant shift for large businesses.

Amongst the countries included in this year's Global Impact Monitor, the UK is seeing low performance for large businesses.

The lowest performing markets include UK (48%), Germany (46%), Netherlands (43%), Poland (41%) and Japan (39%).

Performance of businesses conducting themselves in a responsible way (NET 7 – 10 OUT OF 10)

	2024	2025
Small to medium businesses	54%	55%
Large businesses	43%	48% ↑
Governments	42%	43%

Gen Z are also significantly more likely to say that all business types are conducting themselves in a responsible way.

This suggests that as perceptions of performance rise, expectations rise also, meaning businesses will need to keep progressing to meet the growing standards of young people.

Source: SEC Newgate Impact Monitor 2025 & 2024. Q23a. How important do you personally think it is for the following to conduct their business in responsible ways in terms of their environmental, social and governance considerations? Q23b. Overall, how would you rate the performance of the following that operate in the UK when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations? Base 2025: UK respondents n=1,018, Gen Z n=240, Those who intend to vote Labour in the next election n=249. Base 2024: UK respondents n=1,036, Gen Z n=198, Those who intend to vote Labour in the next election n=341.

Denotes significantly **higher** / **lower** compared to 2024

03

CHAPTER 3:

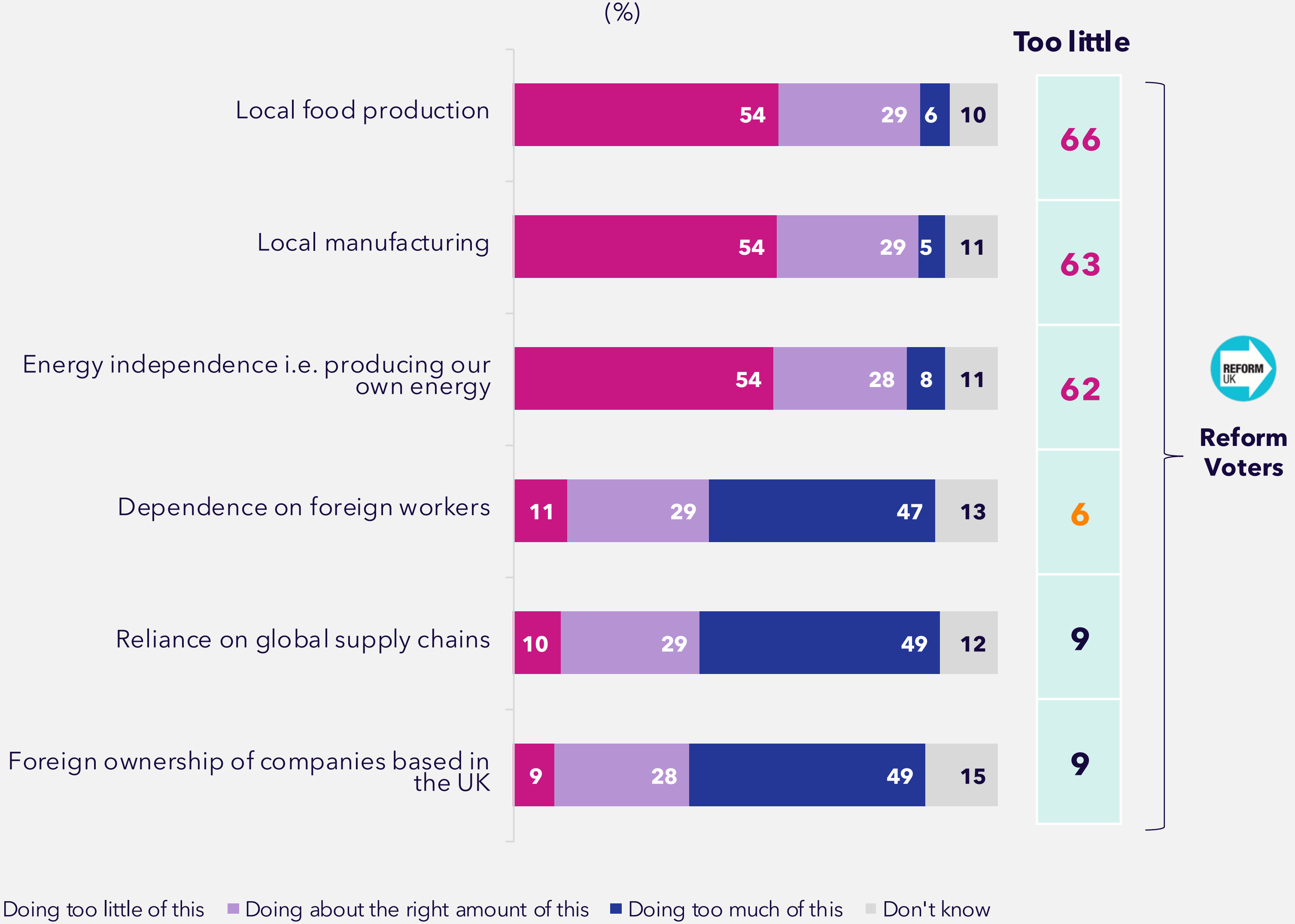
Attitudes towards UK business impact.

Attitudes towards localisation and globalisation.

Around half of the UK public feel that the nation is not prioritising local production enough; and that it is overly dependent on foreign workers, companies and supply chains.

In particular, **Reform Voters** want the UK to focus more on increasing local production and the nation's independence.

Is the UK doing enough of the following?



Source: SEC Newgate Impact Monitor 2025. Q102. Do you think the UK has too much, too little or about the right amount of these? Base: UK respondents n=1,018, Those who intend to vote Labour in the next election n=249, Those who intend to vote Conservative in the next election n=150, Those who intend to vote Reform UK in the next general election n=223

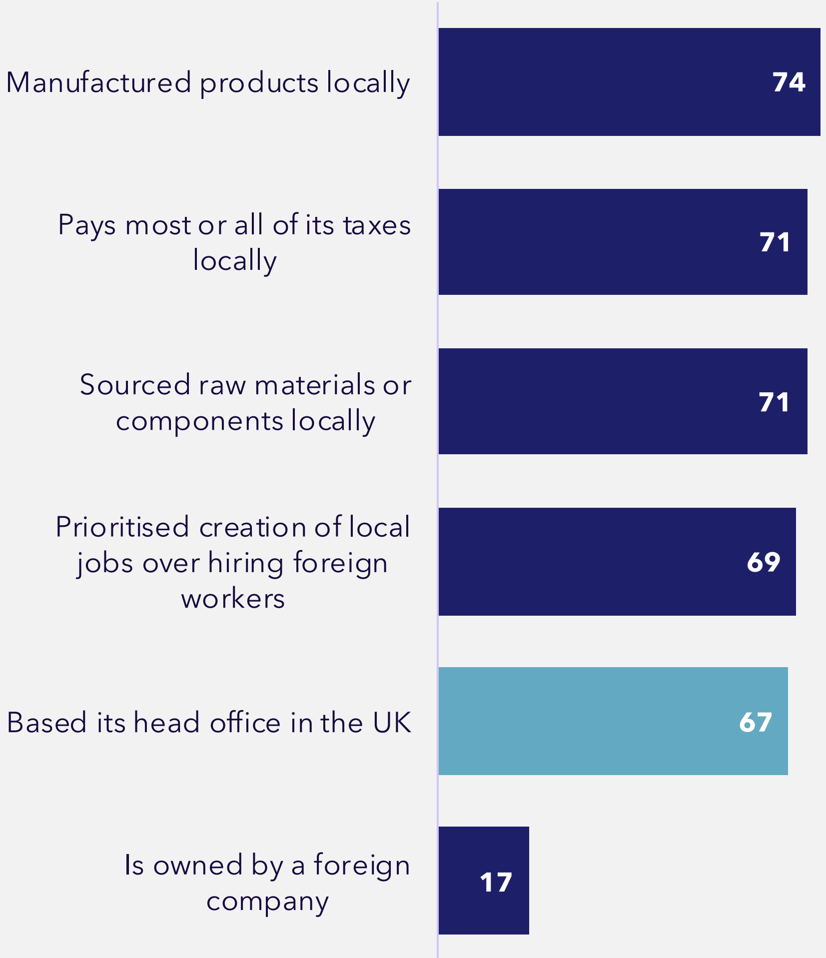
Denotes significantly **higher** / **lower** compared to other voters

The UK public back businesses with local roots.

3 in 4 Labour and Reform voters favour companies headquartered in the UK, highlighting a point of unity across political divides.

How the public would feel about a businesses if they did the following...

(% NET More positive)



	Labour	Conservatives	Reform UK
Manufactured products locally	78	75	79
Pays most or all of its taxes locally			
Sourced raw materials or components locally	76	71	73
Prioritised creation of local jobs over hiring foreign workers	78	70	74
Based its head office in the UK	73	69	77
Is owned by a foreign company	75	69	78
	29	26	13

Source: SEC Newgate Impact Monitor 2025. Q103 - Would you personally feel more posit more negative or would it make no difference to how you felt about a business if it did the following things? Base: UK respondents n=1,018, Those who intend to vote Labour in the election n=249, Those who intend to vote Conservative in the next election n=150, Those who intend to vote Reform UK in the next general election n=223

Denotes significantly **higher** / **lower** compared to NET

Localisation is a priority – for manufacturing and hiring – even if it means higher costs for consumers.

A majority (over 6 in 10) would prefer to prioritise manufacturing goods locally, hiring employees locally, and purchasing raw materials or components locally, over minimising costs for consumers.

IMPLICATION FOR BUSINESSES
Emphasising UK operations in branding and communications, and highlighting local investment may be a way to improve perceptions.

Localisation vs globalisation:
What should the priorities be for businesses?

Businesses should...

Source: SEC Newgate Impact Monitor 2025. Q84/Q85/Q86. Now we'd like your feedback on some choices that businesses are required to make. For each, please indicate which one comes closest to your personal point of view. Businesses should... Base: UK Respondents n=1018

Voting intention shows clear divides in perceptions of the UK's relationship with other countries.

Labour voters are significantly more likely to rate the relationship of the UK with all countries listed more highly.

Only 44% of Reform voters say the UK's relationship with the EU is good (compared to 75% of Labour voters).

The UK view the nation's relationship to be the strongest with Australia and Canada.

The UK's relationship with other countries

(% NET Good to Excellent)

	NET	Labour	Conservatives	REFORM UK
Australia	74	84	81	77
Canada	74	85	81	73
USA	58	69	68	66
Japan	58	73	71	55
The European Union	55	75	59	44
India	51	64	60	56
United Arab Emirates (UAE)	46	61	56	47
Brazil	40	57	51	37
China	33	48	40	28
Russia	20	32	31	11

SEC Newgate Impact Monitor 2025 Q101 - Overall, how would you rate the current relationship of the UK with each of the following? Base: UK respondents n=1,018, Those who intend to vote Labour in the next election n=249, Those who intend to vote Conservative in the next election n=150, Those who intend to vote Reform UK in the next general election n=223

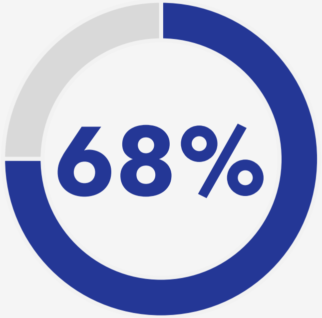
Denotes significantly **higher** / **lower** compared to NET

Attitudes towards the environment and renewable energy.

Perceived importance of the renewable energy transition

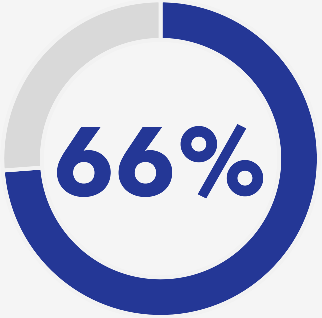
Over 2 in 3 of the UK public agree that it's important for the UK to be transitioning to renewable and clean energy sources, and that the country is acting decisively on climate change. Echoing this, around 2 in 3 say they would actually feel more positive towards a business that is using renew able energy and demonstrating a commitment to environmental sustainability.

Importance for the future of country/territory



say it's highly **important** for their country to **transition to renewable/ clean energy sources**

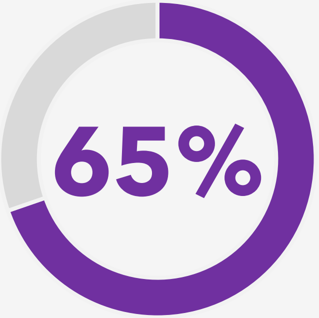
*rated as 7-10 out of 10



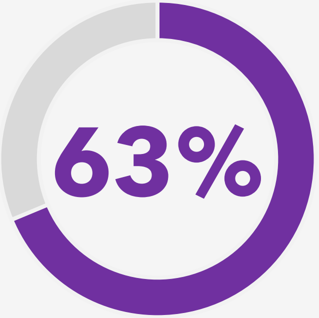
also think it's highly **important** for their country to **act decisively on climate change**

*rated as 7-10 out of 10

Sentiment towards a business



would feel **more positive** towards a business knowing that it **used renewable energy**



would feel **more positive** towards a business if it **demonstrates a commitment to environmental sustainability**

Source: SEC Newgate Impact Monitor 2025. Q19. The following are things that some people believe are important for [country/territory's] future. How important are these things to you personally? Q103. Would you personally feel more positive, more negative or would it make no difference to how you felt about a business if it did the following things? Base: UK Respondents n=1018

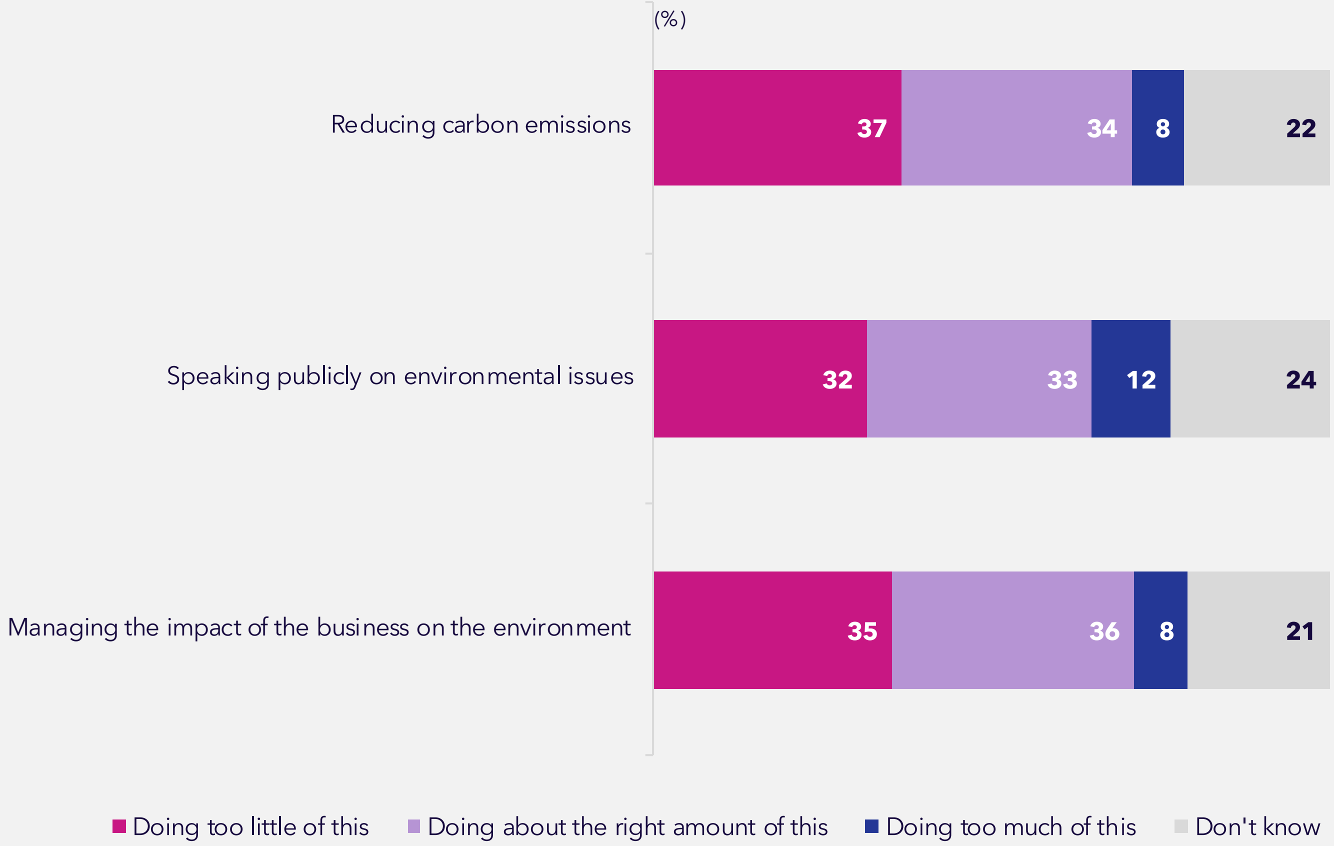
Only 1 in 3 believe that large businesses are taking the right amount of environmental action.

Though only a small cohort, around 1 in 10 believe that large businesses are doing **too much** in these areas.

A substantial proportion (1 in 5) of the UK public also **do not know** how businesses are conducting themselves environmentally, indicating that there may be an engagement gap.

Environmental leadership:

Are large businesses doing enough?



Source: SEC Newgate Impact Monitor 2025. Q80. Overall, are large businesses in [country/territory] doing too much, too little or about the right amount of each of the following? Base: UK Respondents n=1018

Whilst the UK public accept that businesses must factor in the environment, they are divided on whether it should be prioritised over profit, cost and pay.

IMPLICATION FOR BUSINESSES

Whilst the majority agree that companies should be prioritising reducing carbon emissions over profitability, they are more divided about whether businesses should be prioritising increasing pay/benefits for workers and keeping costs low or reducing carbon emissions. This suggests that businesses need to take a balanced approach: show progress on environmental goals whilst reinforcing commitment to financial stability and fair wages.

Environmental leadership:

What should the priorities be for businesses?

Businesses should...

Source: SEC Newgate Impact Monitor 2025. Q81/Q82/Q83/Q91. Now we'd like your feedback on some choices that businesses are required to make. For each, please indicate which one comes closest to your personal point of view. Businesses should... Base: UK Respondents n=1018

Attitudes towards social values and inclusion

A minority of the UK public feel that large businesses are taking the right amount of action in relation to social values and inclusion.

Reform voters are significantly more likely to say that large businesses are doing too much of the following:

- Use of DEI initiatives (31%)
- Speaking publicly on political issues (27%)
- Speaking publicly on social issues that are not related to the company (24%)
- Speaking publicly on environmental issues (20%)

Social values and inclusion:
Are large businesses doing enough?

Source: SEC Newgate Impact Monitor 2025. Q80. Overall, are large businesses in [country/territory] doing too much, too little or about the right amount of each of the following? Base: UK Respondents n=1018

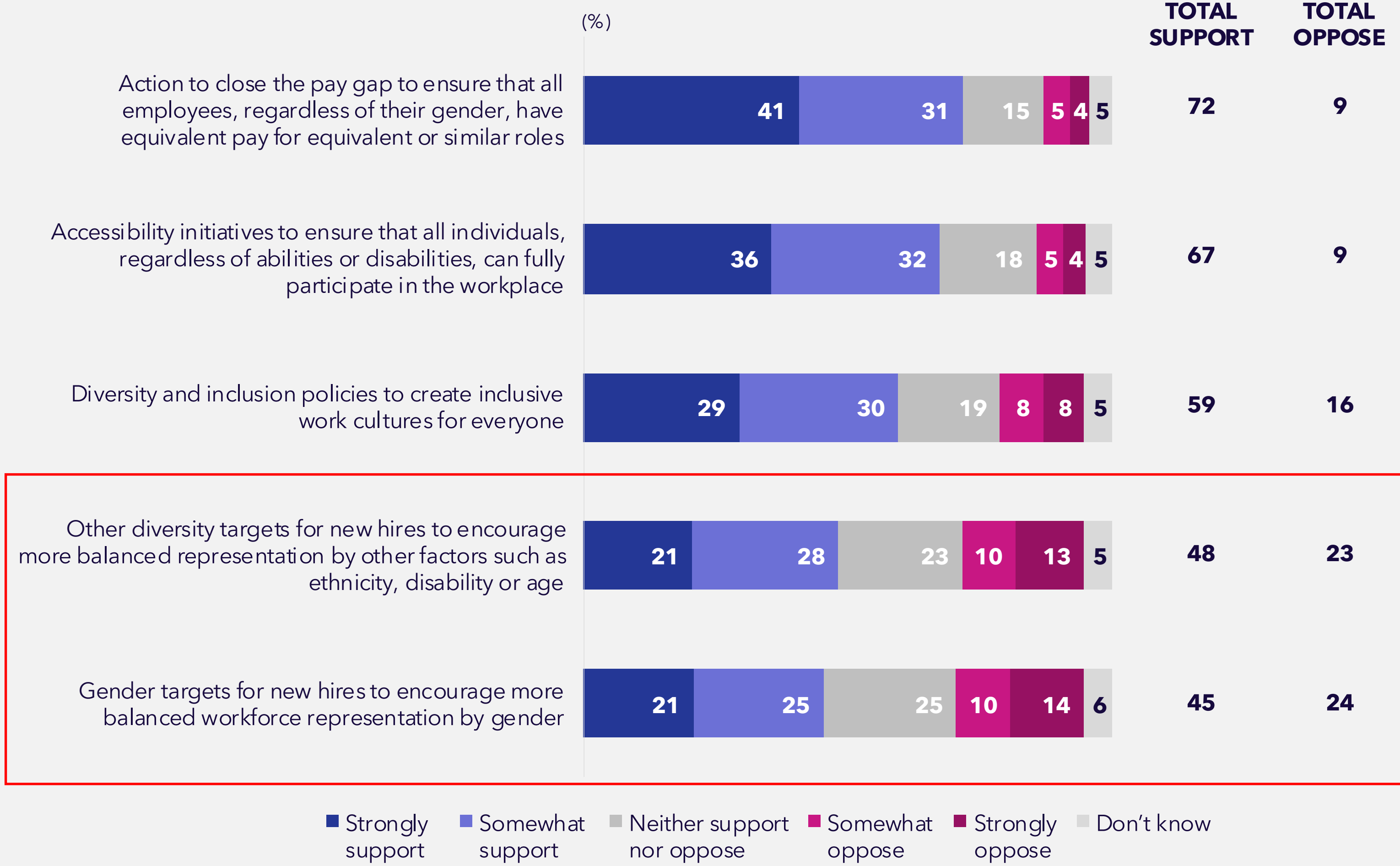
The majority of the UK public are supportive of closing the gender pay gap and accessibility initiatives.

However, support tails off for DEI policies and hiring targets that consider gender, ethnicity, disability and age.

IMPLICATION FOR BUSINESSES

DEI initiatives are still contentious in the UK, even though support for closing the gender pay gap and accessibility initiatives are strongest. Businesses' role here may be two-fold: educating the public on the need for initiatives and focusing on fairness and inclusion through transparency and equal opportunity, rather than numeric targets.

Support for diversity, equity and inclusion initiatives



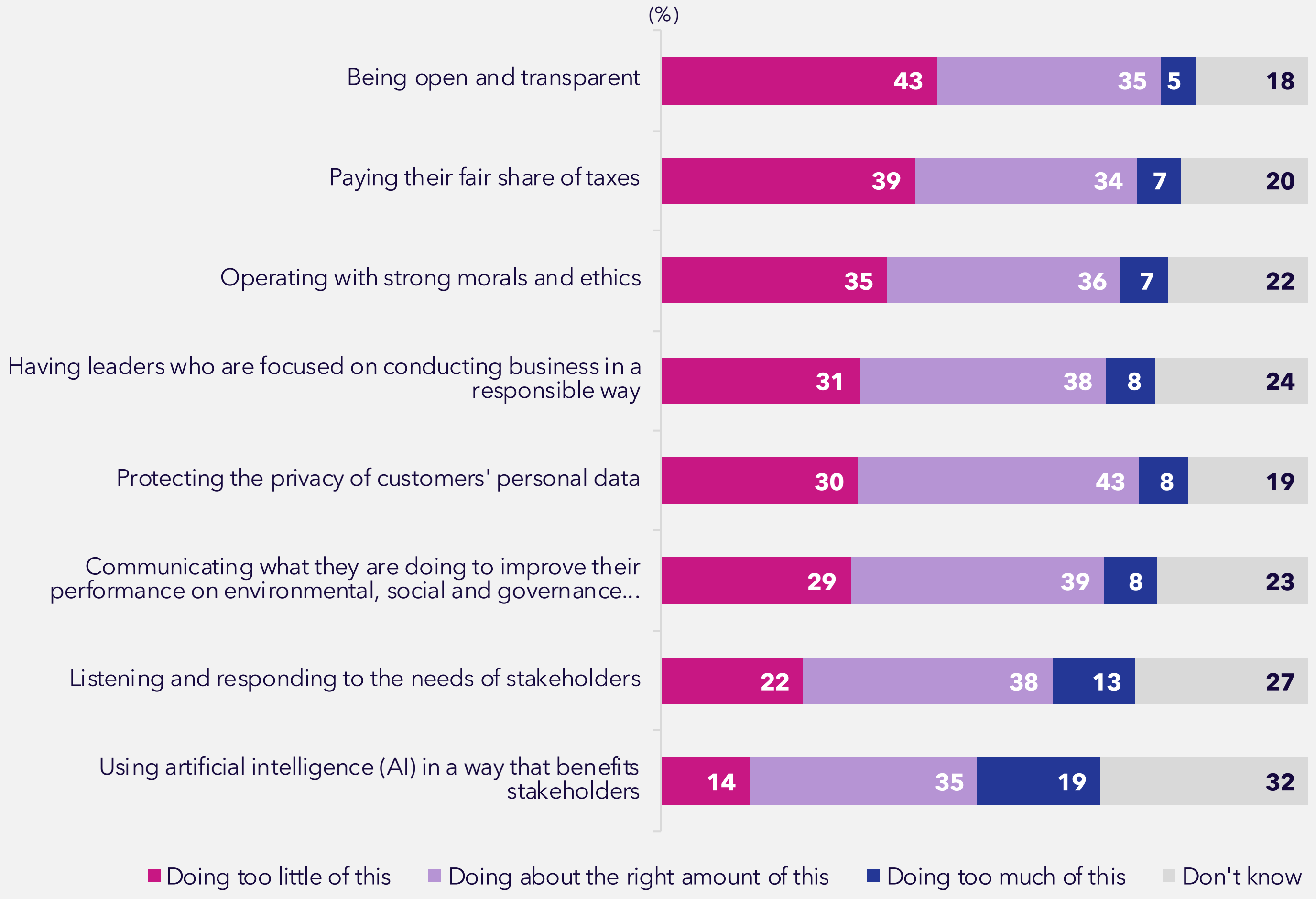
Source: SEC Newgate Impact Monitor 2025. Q100. To what extent do you support or oppose large organisations (i.e. companies and government departments) in [country/territory] implementing the following initiatives? Base: UK Respondents n=1018

Attitudes towards governance and stakeholder accountability.

The UK public feel businesses need to do more to demonstrate transparency, fairness and ethical conduct.

Whether businesses are "Using AI in a way that benefits stakeholders" is the least clear to the UK public (with 32% saying they do not know). This indicates that businesses could be doing more to articulate how they are managing this highly topical, nascent issue.

Governance and stakeholder accountability: Are large businesses doing enough?



Source: SEC Newgate Impact Monitor 2025. Q80. Overall, are large businesses in [country/territory] doing too much, too little or about the right amount of each of the following? Base: UK Respondents n=1018

The UK public strongly support stakeholder consultation, investment into local communities and AI governance.

IMPLICATION FOR BUSINESSES

Governance and accountability is important to the UK. Businesses can show they act in the interests of all stakeholders, not just shareholders, while investing in local communities even if it affects short term profitability. Responsible AI governance is essential, ensuring technology is used ethically without unnecessary job losses. Companies should also prioritise sourcing from suppliers with strong reputations for responsibility, rather than simply choosing the lowest-cost option.

Governance & stakeholder accountability:
What should the priorities be for businesses?

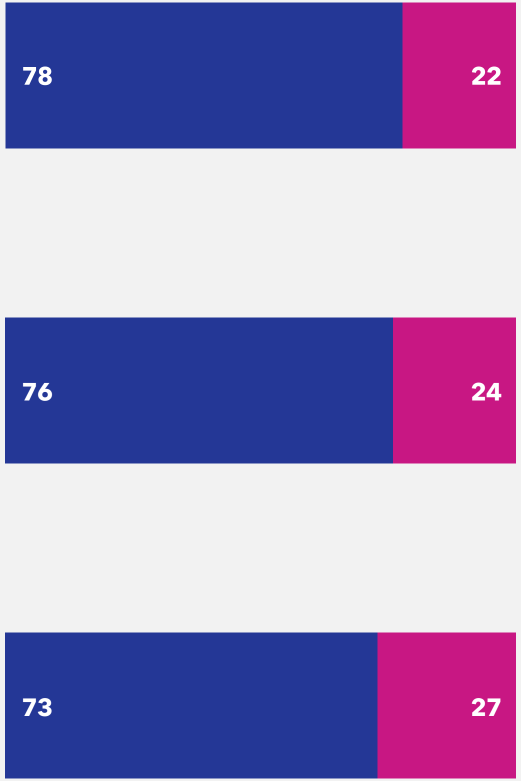
Businesses should…

(%)

Act in the best interest of **all their stakeholders**, including shareholders

Make investments to **support the local communities** in which they operate, even if it has an impact on profitability

Utilise Artificial Intelligence (AI) in their operations **only if it doesn't make current staff members redundant**



Act in the best interest of **their shareholders** ahead of other types of stakeholders

Prioritise profitability over making investments in the local communities in which they operate

Utilise Artificial Intelligence (AI) in their operations **regardless of whether it makes current staff members redundant**

Source: SEC Newgate Impact Monitor 2025. Q87/Q92/Q94/Q95. Now we'd like your feedback on some choices that businesses are required to make. For each, please indicate which one comes closest to your personal point of view. Businesses should… Base: UK Respondents n=1018

Attitudes towards businesses speaking out.

The UK public are giving businesses strong direction to speak out – however, this is driven by age and political stance.

Businesses should…

82%
SPEAK OUT ON ENVIRONMENTAL ISSUES even if it makes them unpopular with the government

Lower for Reform voters (76%)

79%
TALK ABOUT THEIR VALUES even if it does not align with the views of the government

Higher for Green Party voters (87%)

76%
SPEAK OUT ON SOCIAL ISSUES even if it makes them unpopular with the government

Lower for Millennials (69%) and for Reform Voters (69%)

75%
SPEAK OUT ON SOCIAL ISSUES even if it some stakeholders are unhappy about it

Higher for Gen Z (81%) and for Green Party voters (88%)

Source: SEC Newgate Impact Monitor 2025. Q88, Q89, Q90, Q91. Now we'd like your feedback on some choices that businesses are required to make. For each, please indicate which one comes closest to your personal point of view. Businesses should… Base: UK Respondents n=1018, Reform voters n=223, Green Party voters n=67, Gen Z n=240, Millennials n=298

However, there is a disconnect between what the UK public want to hear from businesses, and what actions they want them to take.

Social values and inclusion:

What should the priorities be for businesses?

The majority of the UK public agree that businesses should…

TALK ABOUT THEIR VALUES	SPEAK OUT ON SOCIAL ISSUES	SPEAK OUT ON ENVIRONMENTAL ISSUES

However, **when it comes to inclusion in action**, the UK public are less certain, with the **majority preferencing 'hiring whoever is best suited to a role'** rather than hiring by ensuring appropriate opportunities are given to those who may be at a disadvantage.

Source: SEC Newgate Impact Monitor 2025. Q88, Q89, Q90, Q91. Now we'd like your feedback on some choices that businesses are required to make. For each, please indicate which one comes closest to your personal point of view. Businesses should… Base: UK Respondents n=1018,

CHAPTER 4:

Segmenting UK audiences by their expectations of business impact

Segmentation analysis was conducted on a series of trade off questions, which asked respondents to pick between two choices that businesses can make. **These questions were the basis of our segmentation analysis, creating four distinct segments in the UK population, based on factors that shape UK attitudes towards business.**

SEGMENTING THE UK PUBLIC BASED ON THEIR VIEWS ON WHETHER BUSINESSES SHOULD…

- PRIORITISE ENVIRONMENTAL ISSUES
- PRIORITISE GLOBAL
- PRIORITISE LOCAL
- SPEAK OUT ON SOCIAL AND ENVIRONMENTAL ISSUES
- BE ACCOUNTABLE TO SHAREHOLDERS ONLY OR ALL STAKEHOLDERS
- PRIORITISE DEI
- PRIORITISE PROFIT, PAY AND COST

Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should…? Base 2025: UK respondents n=1,018, Those in segment 1 - local advocates n=145, Those in segment 2 – traditionalists n=226, Those is segment 3 – consumer advocates n=371, Those in segment 4 – pioneers n=276.

Attitude statements that underpin the segmentation analysis.

PRIORITISE ENVIRONMENTAL ISSUES

- **Prioritise reducing carbon emissions** over profitability
- **Prioritise reducing carbon emissions** over increasing the pay and benefits for employees
- **Prioritise reducing carbon emissions** over keeping costs low for consumers

PRIORITISE DEI

- Hire whoever they feel is the best suited to a role or position, but **ensure appropriate opportunities are given to those who may be at a disadvantage due to age, gender, ethnicity or religion**
- **Hire whoever they feel is best suited to a role** or position, regardless of age, gender, ethnicity or religion

BE ACCOUNTABLE TO SHAREHOLDERS ONLY OR ALL STAKEHOLDERS

- **All their stakeholders**, including shareholders
- **Their shareholders** ahead of other types of stakeholders

PRIORITISE GLOBAL

- **Hire employees from anywhere** in the world to keep costs low for consumers
- **Manufacture goods in a foreign country** to keep costs low for consumers
- Purchase raw materials or components to be used in production from **foreign suppliers** that minimises costs for consumers

PRIORITISE LOCAL

- **Hire employees locally** even if it means higher costs for consumers
- **Manufacture goods locally** even if it means higher costs for consumers
- Purchase raw materials or components for use in production from **local suppliers** even if it means higher costs for consumers
- **Make investments to support the local communities** in which they operate, even if it has an impact on profitability

SPEAKING OUT VS NOT SPEAKING OUT (ON SOCIAL OR ENVIRONMENTAL ISSUES)

- **Speak out on social issues** even if it makes them unpopular with governments in their country
- **Speak out on environmental issues** even if it makes them unpopular with governments in their country
- **Not speak out on social issues** if it makes them unpopular with governments in their country
- **Not speak out on environmental issues** if it makes them unpopular with governments in their country

PROFIT, COST and PAY

- **Prioritise profitability** over reducing carbon emissions
- **Prioritise increasing the pay and benefits for employees** over reducing carbon emissions
- **Prioritise keeping costs low for consumers** over reducing carbon emissions
- **Prioritise profitability** over making investments in the local communities in which they operate

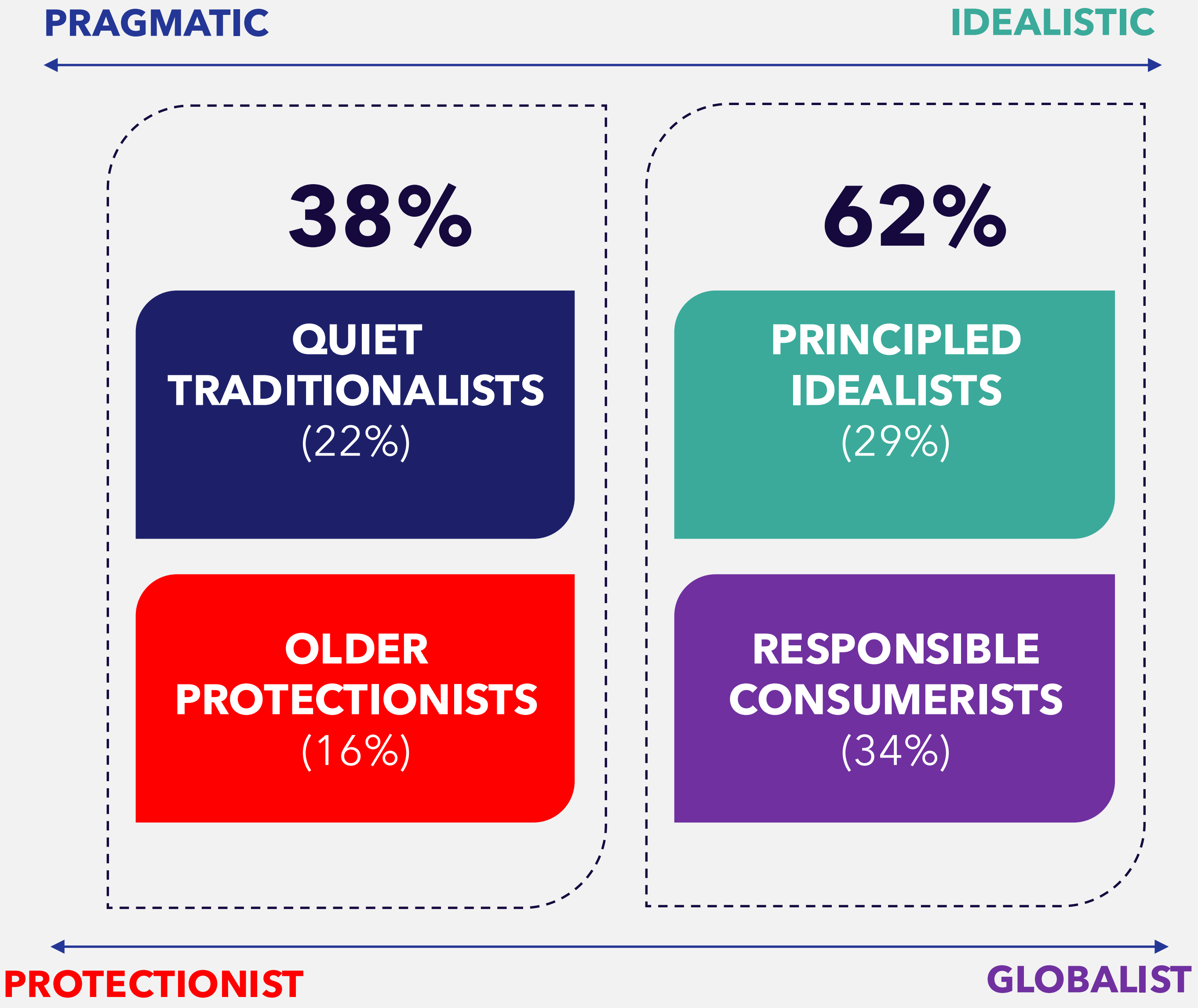
Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should…? Base 2025: UK respondents n=1,018, Those in segment 1 - local advocates n=145, Those in segment 2 – traditionalists n=226, Those is segment 3 – consumer advocates n=371, Those in segment 4 – pioneers n=276.

Introducing the segments.

The 4 segments are divided on two scales.

Some are more pragmatic compared to idealistic, whilst others are more protectionist compared to globalist.

These four key categories show that the UK public's approach to business conduct is complex.



Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should...? Base 2025: UK respondents n=1,018, Quiet Traditionalists n=226, Responsible Consumerists n=371, Older Protectionists n=145, Principled Idealists n=276

Understanding the segments.

QUIET TRADITIONALISTS (22%)

This cohort are **pragmatic and profit-focused**, believing businesses should **avoid taking public stances on social or environmental issues** if it risks controversy.

This group **values financial stability over sustainability or community investment**, prioritising profitability above all else.

OLDER PROTECTIONISTS (16%)

They are **practical and cost-conscious**, yet reveal a clear tension in their priorities. They strongly favour a **local-first approach** (for manufacturing, hiring, and sourcing locally) even if it raises costs, but at the same time they want businesses to **keep consumer prices low** and avoid spending on environmental initiatives. They **care little about diversity policies,** focusing instead on straightforward, no-frills solutions that deliver value without complexity or progressive positioning. They **lean older, with a strong presence of Boomers and Gen X** and a notable Reform UK alignment.

RESPONSIBLE CONSUMERISTS (34%)

They are **globally minded and socially conscious**, expecting companies to **take a stand on social and environmental issues** even when it's controversial. At the same time, they are **pragmatic about cost, favouring global manufacturing and overseas hiring to keep prices low**.

This group **values inclusivity and transparency**, believing all stakeholders should have a voice in decisions. They lean younger, with strong representation from Gen Z and Millennials.

PRINCIPLED IDEALISTS (29%)

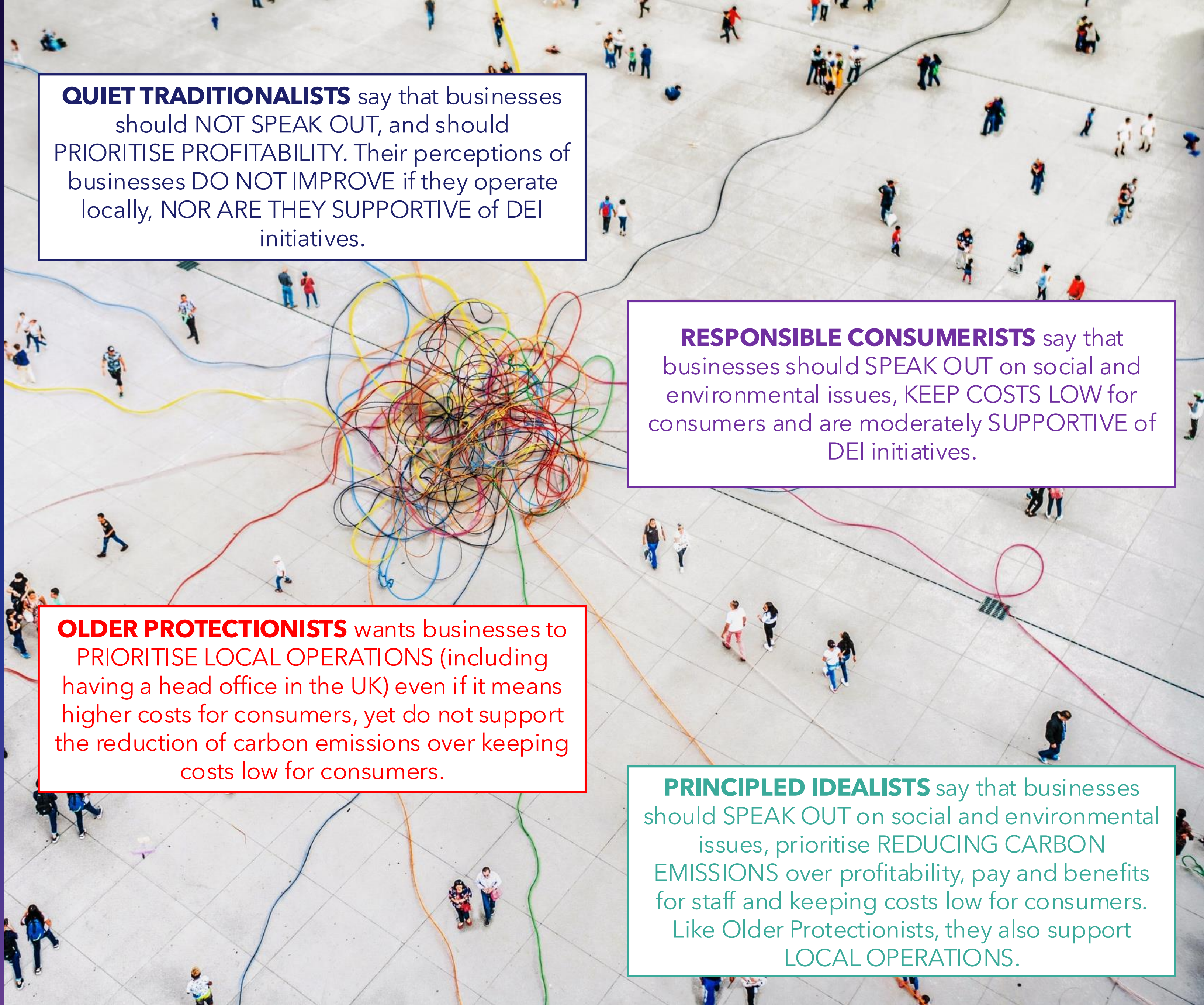
They are **principled consumers** who **put environmental responsibility and local community support ahead** of profit or convenience.

This group expects businesses to **reduce carbon emissions, source and hire locally, and take a stand on social and environmental issues**, even when it's unpopular.

They are motivated by authenticity and ethics, and want businesses to act boldly.

Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should…? Base 2025: UK respondents n=1,018, Quiet Traditionalists n=226, Responsible Consumerists n=371, Older Protectionists n=145, Principled Idealists n=276

The differences between the four segments highlight the complex landscape businesses are navigating in the UK.



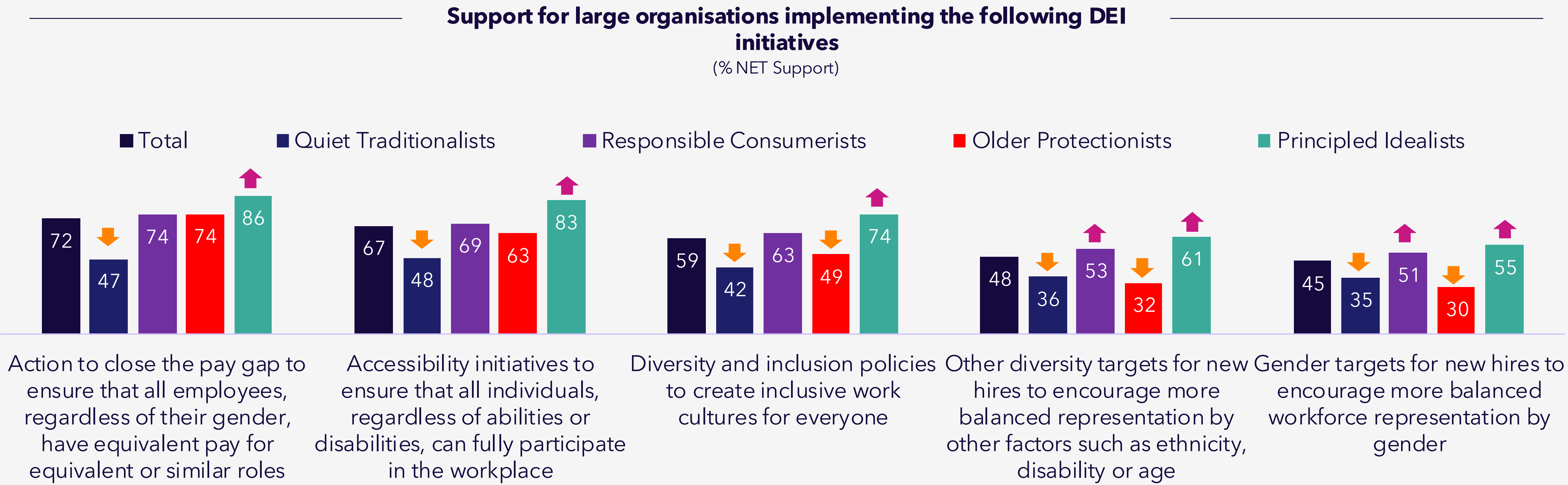
QUIET TRADITIONALISTS say that businesses should NOT SPEAK OUT, and should PRIORITISE PROFITABILITY. Their perceptions of businesses DO NOT IMPROVE if they operate locally, NOR ARE THEY SUPPORTIVE of DEI initiatives.

RESPONSIBLE CONSUMERISTS say that businesses should SPEAK OUT on social and environmental issues, KEEP COSTS LOW for consumers and are moderately SUPPORTIVE of DEI initiatives.

OLDER PROTECTIONISTS wants businesses to PRIORITISE LOCAL OPERATIONS (including having a head office in the UK) even if it means higher costs for consumers, yet do not support the reduction of carbon emissions over keeping costs low for consumers.

PRINCIPLED IDEALISTS say that businesses should SPEAK OUT on social and environmental issues, prioritise REDUCING CARBON EMISSIONS over profitability, pay and benefits for staff and keeping costs low for consumers. Like Older Protectionists, they also support LOCAL OPERATIONS.

Highlighting their key differences, Principled Idealists are more supportive of all DEI initiatives, whilst Quiet Traditionalists are significantly less supportive.



Source: SEC Newgate Impact Monitor 2025. Q100 - To what extent do you support or oppose large organisations (i.e. companies and government departments) in [COUNTRY_PIPE 1] implementing the following initiatives? (NET Support) Base 2025: UK respondents n=1,018, Quiet Traditionalists n=226, Responsible Consumerists n=371, Older Protectionists n=145, Principled Idealists n=276

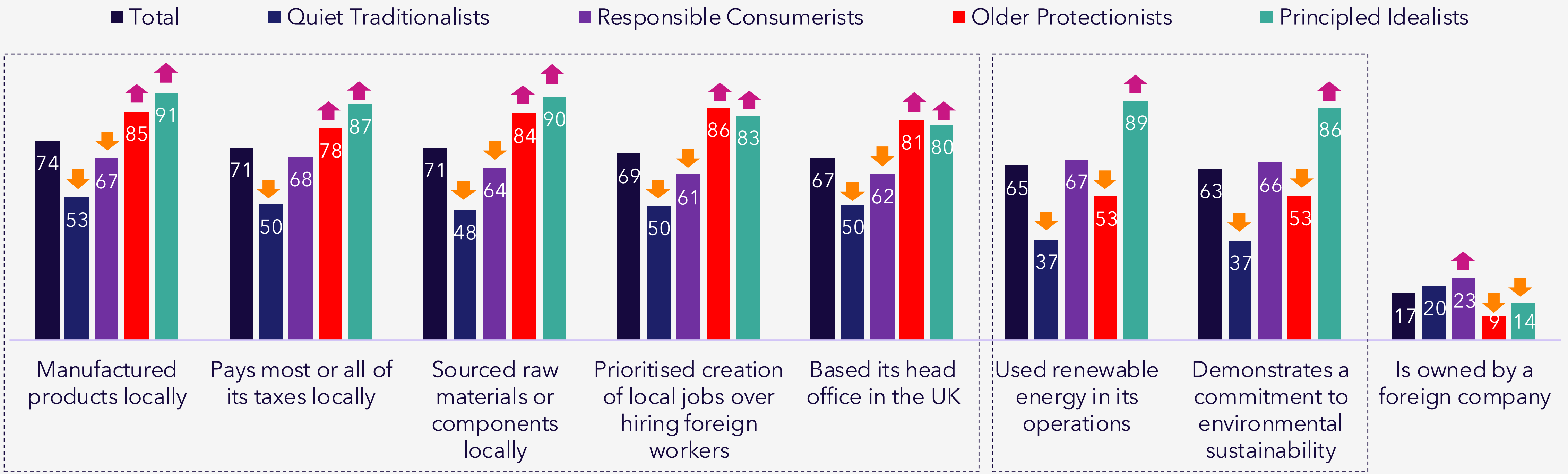
Denotes significantly **higher** / **lower** compared to NET

Older Protectionists and Principled Idealists are significantly more likely to have a positive view of businesses that focus on local operations.

Quiet Traditionalists and **Responsible Consumerists** have the lowest support for businesses operating locally, likely due to the former's focus on businesses focusing on profitability over all else - and the latter's focus on prioritising keeping costs low for consumers. Additionally **Principled Idealists** have more positive perceptions of businesses who are committed to environmentally conscious practices.

How the public would feel about a businesses if they did the following...

(% NET More positive)



Source: SEC Newgate Impact Monitor 2025. Q103. Would you personally feel more positive, more negative or would it make no difference to how you felt about a business if it did the following things? (NET More positive) Base 2025: UK respondents n=1,018, Quiet Traditionalists n=226, Responsible Consumerists n=371, Older Protectionists n=145, Principled Idealists n=276

Denotes significantly **higher** / **lower** compared to NET

How should businesses engage these segments?

QUIET TRADITIONALISTS

- Emphasise **reliability, economic strength**, and **operational resilience**.
- **Avoid framing success around social or environmental issues** – these may alienate this audience.
- **Keep ESG commitments balanced**; do not let them overshadow core business performance.
- **Steer clear** of advocacy that could be **perceived as political** or **divisive**.

OLDER PROTECTIONISTS

- Avoid signalling costly sustainability initiatives.
- **Show commitment to local sourcing and hiring** as a mark of authenticity.
- Focus on **benefits like price stability** and **support for the local economy**.
- **Avoid overemphasising ESG or DEI initiatives** in communications.

RESPONSIBLE CONSUMERISTS

- Take a **bold stance on social and environmental issues.**
- Show **principled action** over neutrality; values matter to this group.
- **Balance ethical advocacy with cost-driven pragmatism** – they expect global thinking (manufacturing and hiring overseas to keep costs low).
- **Consult all stakeholders**, including shareholders, to demonstrate transparency and inclusivity.

PRINCIPLED IDEALISTS

- Demonstrate **authentic commitment to environmental action** and **local impact**.
- Speak out on **social and environmental issues** that matter to your business – transparency and advocacy matter to this cohort.
- Demonstrate usage of local materials sourcing and local partnerships where possible.

Segment profiles

Quiet Traditionalists.

QUIET TRADITONALISTS (22%)

This cohort are pragmatic and profit focused, believing businesses should avoid taking public stances on social or environmental issues if it risks controversy.

This group values financial stability over sustainability or community investment, prioritising profitability above all else.

GENDER

59% male, 41% female

AGE

GEN Z	21%
MILLENIALS	26%
GEN X	26%
BOOMERS	24% ↓
SILENT GEN	2%

VOTING INTENTION

Labour	Conservative	Reform UK	Green Party
18%	14%	28% ↑	7%

DEFINING SEGMENT ATTITUDES

BUSINESSES SHOULD…

NOT SPEAK OUT

- On social issues if it makes them unpopular with the government
- On environmental issues if it makes them unpopular with the government

PRIORITISE PROFITABILITY

- Over reducing carbon emissions
- Over making investments in the local communities they operate

Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should…? Age/Gender. D8 - If there was a general election held tomorrow, which party would you vote for? Base 2025: Quiet Traditionalists n=226

↑↓ Denotes significantly **higher** / **lower** compared to NET

Responsible Consumerists.

CONSUMERISTS (34%)

They are globally minded and socially conscious, expecting companies to take a stand on social and environmental issues even when it's controversial. At the same time, they are pragmatic about cost, favouring global manufacturing and overseas hiring to keep prices low. This group values inclusivity and transparency, believing all stakeholders, should have a voice in decisions, and they lean younger, with strong representation from Gen Z and Millennials.

GENDER

51% (male) 49% (female)

AGE

GEN Z	31%
MILLENIALS	26%
GEN X	23%
BOOMERS	18% ↓
SILENT GEN	2%

VOTING INTENTION

Labour	Conservative	Reform UK	Green Party
29%	17%	18% ↓	6%

DEFINING SEGMENT ATTITUDES
BUSINESSES SHOULD…

SPEAK OUT

- On social issues if it makes them unpopular with the government
- On environmental issues if it makes them unpopular with the government

THINK GLOBAL

- Manufacture goods in a foreign country to keep costs low for consumers
- Hire people in a foreign country to keep costs low for consumers

CONSULT ALL STAKEHOLDERS

Including shareholders

Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should…? Age/Gender. D8 - If there was a general election held tomorrow, which party would you vote for? Base 2025: Responsible Consumerists n=371

↑↓ Denotes significantly **higher** / **lower** compared to NET

Older Protectionists.

OLDER PROTECTIONISTS (16%)

They are practical and cost-conscious, yet reveal a clear tension in their priorities. They strongly favour a **local-first approach** (for manufacturing, hiring, and sourcing locally) even if it raises costs, but at the same time they want businesses to **keep consumer prices low** and avoid spending on environmental initiatives. They care little about diversity policies, focusing instead on straightforward, no-frills solutions that deliver value without complexity or progressive positioning, and they lean older, with a strong presence of Boomers and Gen X, and a notable Reform UK alignment.

GENDER

43% (male) 57% (female)

AGE

GEN Z	6% ↓
MILLENIALS	14% ↓
GEN X	34% ↑
BOOMERS	40% ↑
SILENT GEN	5%

VOTING INTENTION

Labour	Conservative	Reform UK	Green Party
10% ↓	14%	37% ↑	2% ↓

DEFINING SEGMENT ATTITUDES

BUSINESSES SHOULD…

THINK LOCAL

- Manufacture goods locally even if it means higher costs for consumers
- Hire employees locally even if it means higher costs for consumers
- Purchase raw materials or components for use in production from local suppliers, regardless of the cost to the consumer

HIRE WITHOUT DEI

Hire whoever they feel is best suited to a role or position, regardless of age, gender, ethnicity or religion

PRIORITISE KEEPING COSTS LOW FOR CONSUMERS

- Prioritise keeping costs low for consumers over reducing carbon emissions
- Prioritise increasing the pay and benefits for employees over reducing carbon emissions

Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should…? Age/Gender. D8 - If there was a general election held tomorrow, which party would you vote for? Base 2025: Older Protectionists n=145

↑↓ Denotes significantly **higher** / **lower** compared to NET

Principled Idealists.

PRINCIPLED IDEALISTS
(29%)

They are principled consumers who put environmental responsibility and local community support ahead of profit or convenience.

This group expects businesses to reduce carbon emissions, source and hire locally, and take a stand on social and environmental issues, even when it's unpopular. They are motivated by authenticity and ethics, and want businesses to act boldly.

GENDER

42% (male) 58% ↑ (female)

AGE

GEN Z	14%
MILLENIALS	20%
GEN X	21%
BOOMERS	43% ↑
SILENT GEN	2%

VOTING INTENTION

Labour	Conservative	Reform UK	Green Party
20%	14%	16% ↓	9% ↑

DEFINING SEGMENT ATTITUDES
BUSINESSES SHOULD…

PRIORITISE REDUCING CARBON EMISSIONS

- Over profitability
- Over keeping costs low for consumers
- Over increasing the pay and benefits for employees

THINK LOCAL

- Manufacture goods locally even if it means higher costs for consumers
- Hire employees locally even if it means higher costs for consumers
- Purchase raw materials or components for use in production from local suppliers, regardless of the cost to the consumer
- Make investments to support the local communities in which they operate

SPEAK OUT

- On social issues if it makes them unpopular with the government
- On environmental issues if it makes them unpopular with the government

Source: SEC Newgate Impact Monitor 2025. Q81, Q82, Q83, Q84, Q85, Q86, Q90, Q91, Q92, Q93, & Q94. Businesses should…? Age/Gender. D8 - If there was a general election held tomorrow, which party would you vote for? Base 2025: Principled Idealists n=276

↑↓ Denotes significantly **higher** / **lower** compared to NET

Thank you

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05

Appendix

Next generation perceptions of business impact

Echoing the segmentation, research conducted by VotesforSchools with young people reveals that the next generation are also divided on whether businesses should be prioritising profit, or whether they should be guided by a wider host of priorities.

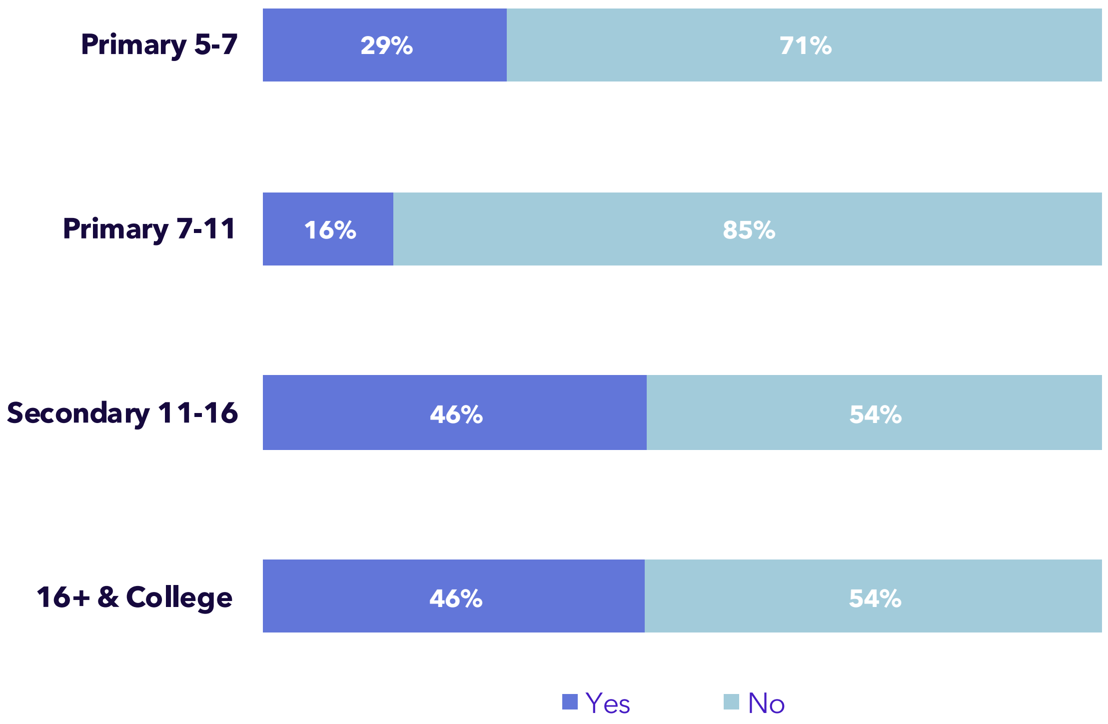
Who are VotesforSchools?

VotesforSchools began in 2016 with a mission: to eliminate political apathy and to ensure the voices of children & young people are heard on today's most pressing issues. Each week, the team at VotesforSchools facilitate topical classroom conversations through carefully curated resources.

SEC Newgate partnered with VotesforSchools on a VoteTopic centred around responsible business.

61,471 young people voted on this VoteTopic.

Primary 5-7 pupils: "Should business-owners only think about money?"
Primary 7-11 pupils: "Should businesses only think about making money?"
Secondary, College, and 16+: "Should making money be the main priority for big businesses?"



Source: VotesforSchools VoteTopic. Base: 61,471 Should making money be the main priority for big businesses?

In their own words.

PRIMARY

✅ "My mum owns a cleaning business and you have to pay your staff and buy the products, plus you need to keep the business going, so **money is really important**."

❎ "There are many things that should be thought about such as **kindness, employee rights and working conditions**. There is more to life than money."

SECONDARY AND COLLEGE

✅ "If you don't make money as a **first priority**, you don't have the **resources** to **make change**."

❎ "If a business plans to be a successful business, **they will consider everything** from the environment, the cost, and how they look after staff. This will mean they make money if people think highly of them."

✅ "To a business there is a priority to make money. It's our choice to decide if they're worthy of our money and should be a business that lasts, so I vote for yes."

❎ "Give money to charity, focus on customer service more, and put money into environmental issues."

Source: VotesforSchools VoteTopic. Base: 61,471 [Should making money be the main priority for big businesses?]

Additional data

Top issues are consistent across voters for the three largest political parties in the UK.

Importance of issues for the future of the UK

Top 5 shown
(NET 7 – 10 OUT OF 10)

Labour	Conservatives	REFORM UK
Addressing the rising cost of living	Strengthening the economy	Reducing crime and violence
Ensuring quality, affordable healthcare for everyone	Ensuring secure and affordable food supplies	Strengthening the economy
Ensuring secure and affordable food supplies	Addressing the rising cost of living	Ensuring quality, affordable healthcare for everyone
Strengthening the economy	Ensuring quality, affordable healthcare for everyone	Addressing the rising cost of living
Ensuring quality, affordable education for everyone	Reducing crime and violence	Ensuring secure and affordable food supplies

Source: SEC Newgate Impact Monitor 2025
Q19. The following are things that some people believe are important for the UK's future.
How important are these things to you personally? Base: Those who intend to vote Labour in the next election n=249, Those who intend to vote Conservative in the next election n=150, Those who intend to vote Reform UK in the next general election n=223

Gen Z and Gen X have starkly different experiences of how businesses enact social values and inclusion.

Social values and inclusion: Are large businesses doing enough?

Gen Z are significantly more likely to say that large businesses are doing too little of the following…

- **Speaking publicly** on **political** issues (30%)
- **Use of DEI initiatives** that promote the fair treatment and full participation of all people in the workforce (30%)

Whilst **Gen X** are significantly more likely to say that that businesses are doing too little of the following…

- Look after the **interests** of their **employees** (43%)
- Have **leaders** who are focused on **conducting business in a responsible way** (36%)

Different generations perceive gaps in corporate responsibility differently. Gen Z expects businesses to take a stronger stand on social issues and diversity, while Gen X is more concerned about employee welfare and ethical leadership.

There is a clear generational divide for a number of issues, with Gen Z calling for these key social issues to be addressed in the UK.

Importance of issues for the future of the UK
(NET 7 – 10 OUT OF 10)

	Baby Boomers	Gen X	Millennials	Gen Z
Improving pay and conditions for workers	**65**	71	76	**84**
Reducing crime and violence	84	79	81	84
Ensuring quality, affordable education for everyone	77	73	75	**83**
Addressing housing affordability and availability	**67**	72	76	**82**
Strengthening the response to violence against women	72	72	72	**82**
Creating new job opportunities	72	70	71	**82**
Strengthening support for people in vulnerable situations	69	69	71	**82**
Managing the impacts of wars	66	**62**	70	**80**
Acting decisively to stop the use of forced and child labour	71	69	67	**80**
Protecting the natural environment and wildlife	78	72	75	80
Managing data security and personal privacy	81	73	74	80
Ensuring secure and affordable energy and fuel supplies	**87**	78	80	80
Investing to support local agriculture	76	67	**64**	**79**
Investing to support local manufacturing	71	68	**65**	**78**
Improving the country's defence capability	76	**65**	67	**78**
Better regulation of companies to prevent unethical behaviour	**62**	**61**	71	**78**
Improving respect between people and groups in the community	62	63	69	**77**
Managing the use of Artificial Intelligence (AI)	65	61	67	**77**
Addressing the deliberate spread of misinformation and "fake news"	72	**65**	69	**77**
Transitioning to renewable/clean energy sources	66	**61**	72	**75**
Improving preparedness for extreme weather events	68	62	68	**75**
Acting decisively on climate change	64	61	71	**73**
Promoting diversity and inclusion for minority groups	**48**	**49**	**62**	**72**
Increasing migration to address skill shortages	**34**	**38**	**53**	**63**

Source: SEC Newgate Impact Monitor 2025. Q19. The following are things that some people believe are important for the UK's future. How important are these things to you personally?
Base: Baby Boomers n=252, Gen X n=206, Millennials n=298, Gen Z n=240

Denotes significantly **higher** / **lower** compared to NET

Support for businesses implementing DEI initiatives falls sharply with age.

Support for DEI initiatives

(% NET Support)

	Total	Boomers	Gen X	Millennials	Gen Z
Action to close the pay gap to ensure that all employees, regardless of their gender, have equivalent pay for equivalent or similar roles	72	71	70	70	75
Accessibility initiatives to ensure that all individuals, regardless of abilities or disabilities, can fully participate in the workplace	67	63	65	71	74
Diversity and inclusion policies to create inclusive work cultures for everyone	59	51	54	68	72
Other diversity targets for new hires to encourage more balanced representation by other factors such as ethnicity, disability or age	48	38	40	56	69
Gender targets for new hires to encourage more balanced workforce representation by gender	45	36	38	56	60

Source: SEC Newgate Impact Monitor 2025. Q100 - To what extent do you support or oppose large organisations (i.e. companies and government departments) in [COUNTRY_PIPE1] implementing the following initiatives? Base: Total Respondents n=1018, Boomers n=252, Gen Z n=206, Millennials n=298, Gen Z n=240

Denotes significantly **higher** / **lower** compared to NET

Public backing remains strong for the UK's transition to renewables, but political and generational gaps ultimately shape views on the energy transition.

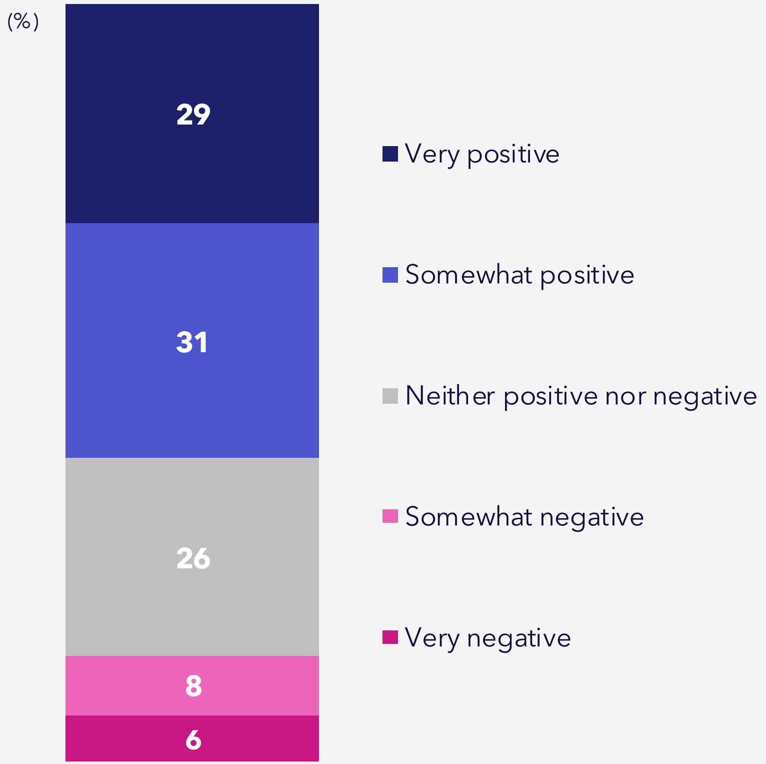
Feelings towards the energy transition

61%

say it's positive for the UK to transition to renewable energy sources
(NET Very + Somewhat Positive)

35%

think that the UK is transitioning away from coal and other fossil fuels, to renewables, too slowly
(NET A bit too slowly + Far too slowly)

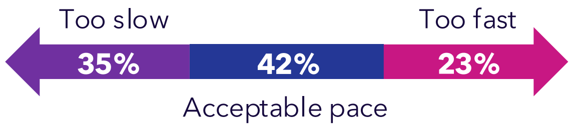


People that feel *most* NET positive:

1. Labour voters (82%)
2. Liberal Democrats (81%)
3. Generation Z (74%)
4. Generation Y (68%)

People that feel *least* NET positive:

1. Reform UK (39%)
2. Silent Generation (41%)
3. Baby Boomers (52%)
4. Generation X (55%)

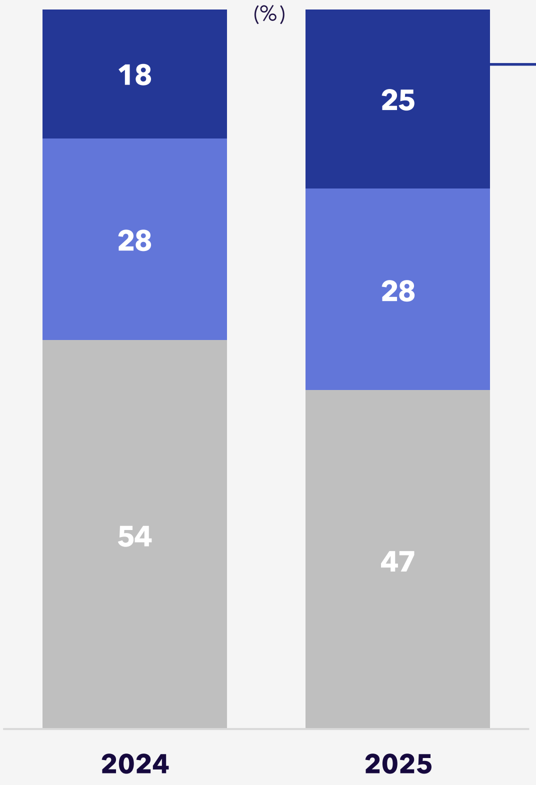


Source: SEC Newgate Impact Monitor 2025 Q70. Overall, do you feel positive or negative about the UK transitioning electricity generation away from coal and other fossil fuels to renewables like solar and wind? Q71. In the UK do you think transitioning electricity generation away from coal and other fossil fuels, to renewables like wind and solar, is moving…? Base: UK respondents n=1,018, Those who intend to vote Labour in the next election n=249, Those who intend to vote Reform UK in the next general election n=223, Those who intent to vote Labour in the next election n=79, Boomers n=252, Gen Z n=206, Millennials n=298, Gen Z n=240, Silent generation n=22.

Awareness and understanding of ESG is growing.

This is how they view ESG - looking specifically at the term "ESG", salience remains low. Still only a little over half have even heard of it – but most are unsure of what it is. Only one in five people felt they had a good understanding of ESG.

Awareness and understanding of ESG



Those aware of ESG were more likely to be:

- Generation Y (39%)
- Generation X (37%)
- Conservative (36%)
- Labour (36%)

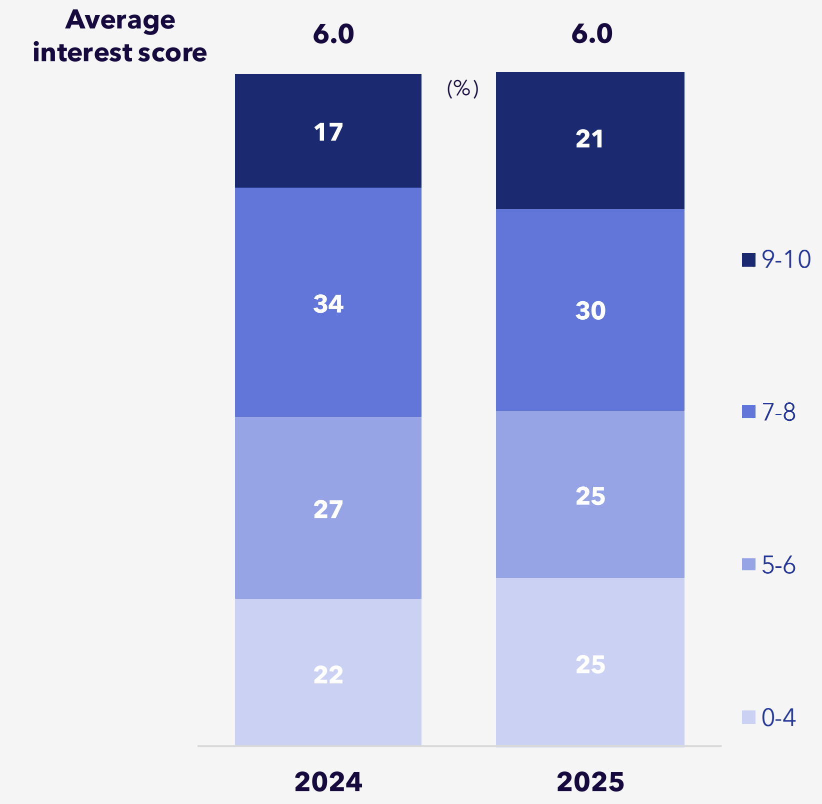
Country	Heard of ESG and have a good understanding of what it means (%)	
	2024	2025
UK	**18**	**25**
EUROPE AVERAGE	**21**	**15**
Italy	17	19
France	14	14
Germany	14	14
Greece	11	18
Poland	9	12
Spain	9	13

Source: SEC Newgate Impact Monitor 2025 & 2024. Q3. Before today, had you heard of the term "ESG" which stands for "Environmental, Social and Governance (ESG)"? Base: 2025. UK respondents n=1,018 Europe respondents n=8,130, Poland respondents n=1,010, Spain respondents n=1,007, Italy respondents n=1,005, Germany respondents n=1,010, Greece respondents n=1,054, France respondents n=1,021 Base: 2024. UK respondents n=1,036 Europe respondents n=7,192, Poland respondents n=1,007, Spain respondents n=1,028, Italy respondents n=1,013, Germany respondents n=1,009, Greece respondents n=1,056, France respondents n=1,043

Interest in ESG issues.

Interest in ESG remains relatively similar to 2024. After explaining the concept, about a third indicate they are highly interested in ESG issues, with an average rating of 6.0 out of 10.

Interest in ESG issues



- 45% of 18–29-year-olds rate interest in ESG issues NET 9+ very important.
- 39% of Labour voters rate interest in ESG issues NET 9+ very important.
- 19% of Reform voter rate interest in ESG issues at 0, not important at all.

Country	NET 6+ Interest in ESG issues (%)	
	2024	2025
UK	**62**	**61**
EUROPE AVERAGE	**74**	**73**
Italy	89	87
France	73	73
Germany	65	64
Greece	85	83
Poland	68	69
Spain	78	80
Netherlands	**	69

Source: SEC Newgate Impact Monitor 2025 & 2024 Q4. How interested are you in Environmental, Social and Governance (ESG) issues, if at all? (0 = not at all, 10=extremely interested) (See appendix for full ESG definition given). *Note: Netherlands were not apart of the global Impact Monitor in 2024 Base: 2025. UK respondents n=1,018 Europe respondents n=8,130, Poland respondents n=1,010, Spain respondents n=1,007, Italy respondents n=1,005, Germany respondents n=1,010, Greece respondents n=1,054, France respondents n=1,021 Base: 2024. UK respondents n=1,036 Europe respondents n=7,192, Poland respondents n=1,007, Spain respondents n=1,028, Italy respondents n=1,013, Germany respondents n=1,009, Greece respondents n=1,056, France respondents n=1,043

The importance of businesses conducting themselves responsibly continues in 2025 – with Gen Z having the highest expectations of organisations.

Importance of these businesses conduct themselves in a responsible way (NET 7 – 10 OUT OF 10)

	2024	2025
Small to medium businesses	67%	67%
Large businesses	75%	77%
Governments	79%	77%

Gen Z are significantly more likely to say that it is important for all business types to conduct themselves in a responsible way.

Labour Voters have high expectations of governments, with 89% saying it is important that they behave responsibly.

Source: SEC Newgate Impact Monitor 2025 & 2024. Q23a. How important do you personally think it is for the following to conduct their business in responsible ways in terms of their environmental, social and governance considerations? Q23b. Overall, how would you rate the performance of the following that operate in the UK when it comes to conducting business in responsible ways – in terms of their environmental, social and governance considerations? Base 2025: UK respondents n=1,018, Gen Z n=240, Those who intend to vote Labour in the next election n=249. Base 2024: UK respondents n=1,036, Gen Z n=198, Those who intend to vote Labour in the next election n=341.

Public opinion on the purpose of tariffs is split – however, Reform voters are more likely to back protectionism.

Public opinion on tariffs

(%)

62

Those intending to vote for Reform in the next election are significantly more likely to say tariffs should be used to protect domestic industries and jobs in the UK from foreign competition

Source: SEC Newgate Impact Monitor 2025 Q105 - Thinking about tariffs, which is a tax imposed by a government on goods and services that are imported into a country. Which one of the following best describes your personal view? Excluding those who answered 'Don't know'.
Source: SEC Newgate Impact Monitor 2025. UK respondents n=1,018. Those who intend to vote Reform UK in the next general election n=223

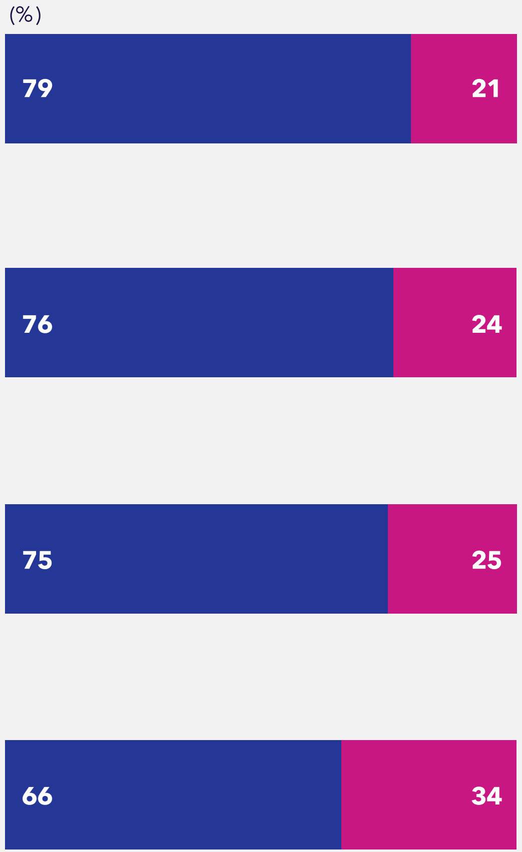
Denotes significantly **higher** / **lower** compared to NET

There is a clear desire for businesses to speak out on social issues and values, even if not aligned with government or stakeholders.

However, businesses hiring whilst considering DEI is less of a priority for the UK public, with 2 in 3 favouring hiring practices that are about who is 'best suited' to the role.

Social values and inclusion: What should the priorities be for businesses?

Businesses should...



Talk about their values even if they don't align with the current views of governments in their country — 79

Not talk about their **values** if they don't align with the current views of governments in their country — 21

Speak out on social issues even if it makes them **unpopular with governments** in their country — 76

Not speak out on **social issues** if it makes them **unpopular with governments** in their country — 24

Speak out on social issues even if some **stakeholders are unhappy** about it — 75

Not speak out on **social issues** if some **stakeholders are unhappy** about it — 25

Hire whoever they feel is the best suited to a role or position, **regardless of their age, gender, ethnicity or religion** — 66

Hire whoever they feel is the best suited to a role or position, but ensure appropriate opportunities are given to **those who may be at a disadvantage** due to age, gender, ethnicity or religion — 34

Source: SEC Newgate Impact Monitor 2025. Q88/Q89/Q90/Q93. Now we'd like your feedback on some choices that businesses are required to make. For each, please indicate which one comes closest to your personal point of view. Businesses should... Base: UK Respondents n=1018