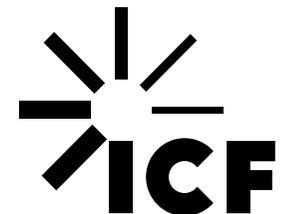
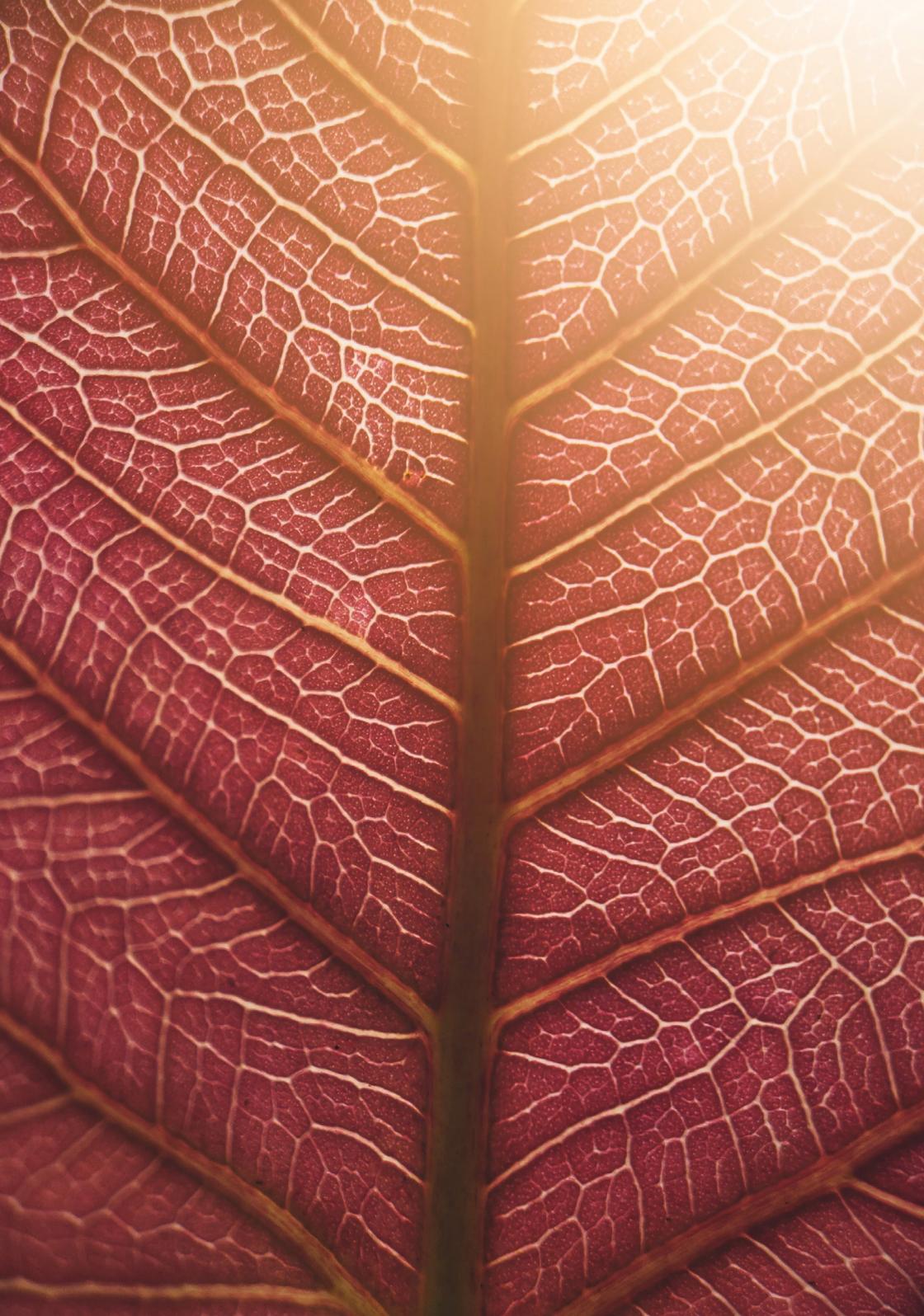




Consumer sentiment highlights the importance of a green recovery

Data Snack #1





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Foreword

2020 has changed life as we know it. As we move towards a post-COVID world, the ways we think and act have evolved, perhaps for good. What matters is how we use these changes to create a so-called “new normal” with green recovery at its heart – a health, economic, and environmental crisis impacts society the world over.

Meeting this future head-on, here at ICF we’ve taken a deep dive into how governments, businesses, and society can build back stronger. Through social listening we’ve created a rounded view of what your audience really wants from a post-COVID world. Here’s a clue: sustainability, greener policies, and a transformative, green restart of the economy are key to getting COVID recovery right.



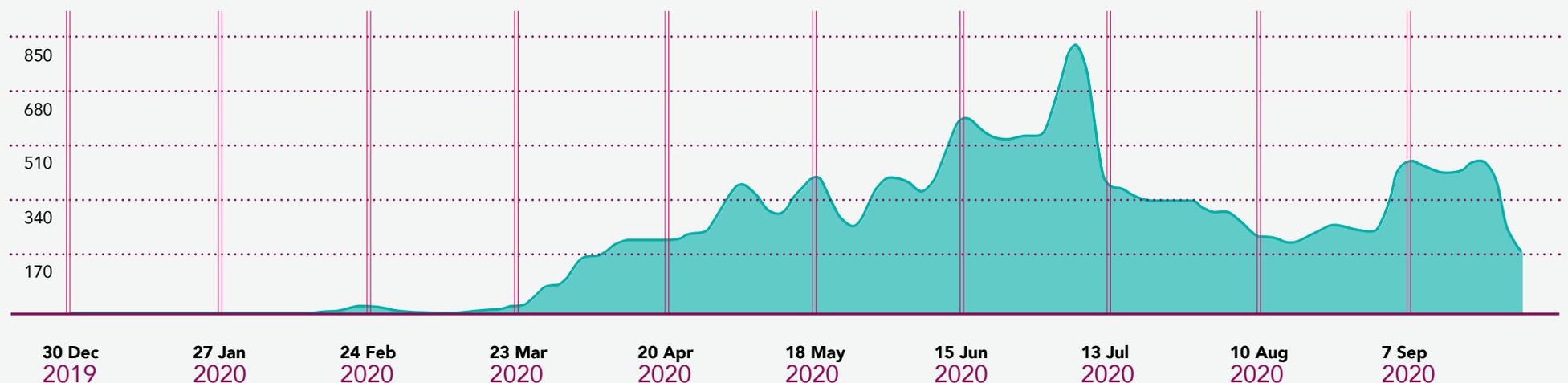
Overview

A sample of Twitter data from the UK (9.5k results, sample size of 25%) was collected from January 1st 2020 - September 30th 2020 to explore how conversations around green recovery have changed since the onset of the COVID-19 pandemic. The focus of this analysis is geared towards consumer public opinion, so handles defined as companies, as well as retweets, were excluded from the data collection task to collect original content.

As seen in the graph below, interest in the green recovery surged in the middle of 2020, reaching a peak on July 6. The first mentions occurred on February 24 (14 results), and the upward trend began on March 23, the same day that the UK lockdown began. Moreover, the sharp drop following the peak on July 6 coincides with the relaxing of UK restrictions on July 4. Interestingly, commentary increased as UK COVID-19 cases began rising a second time in September and further lockdown restrictions were rolled out.

RESULTS OVER TIME

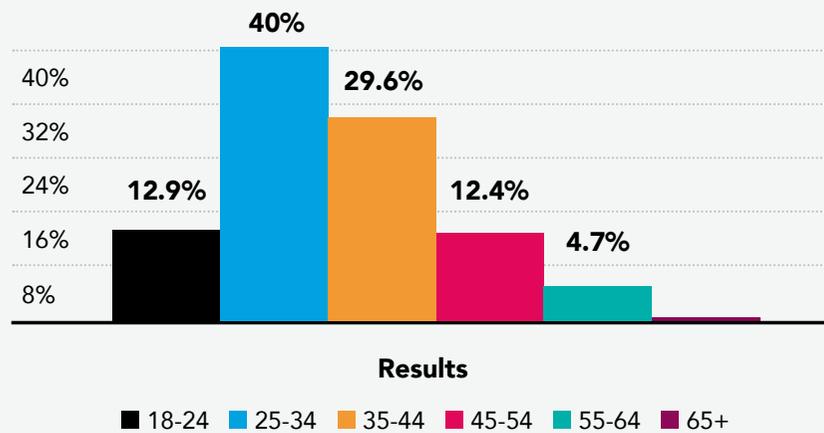
9.5K RESULTS



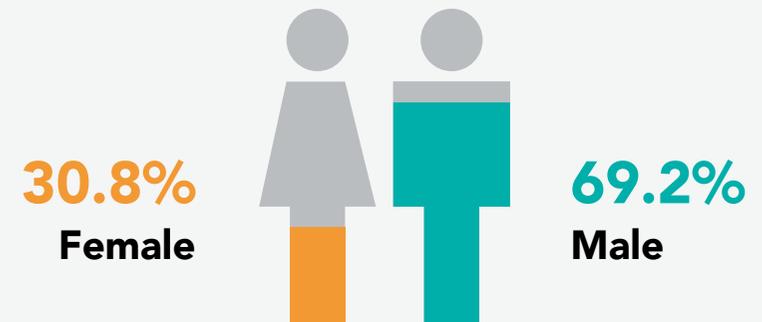
Overview

As can be seen below, millennials (classified as between 23-38 years old) form the most vocal age band in this topic area. The audience is primarily male (69%), which is slightly higher than the latest statistics on the global Twitter gender split – 65% male and 35% female.

AGE



GENDER

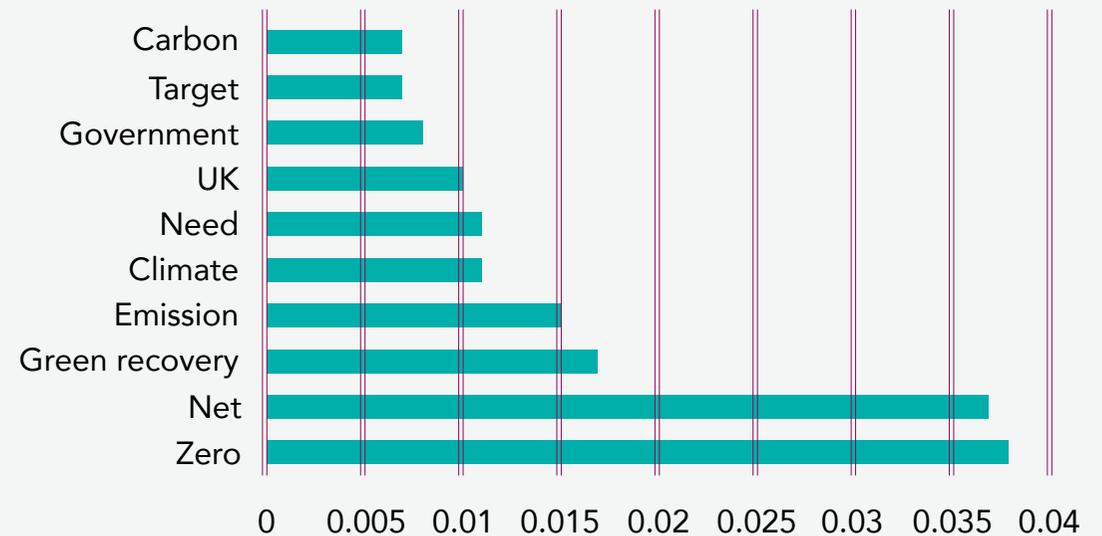


Topic 1: Government

The first topic relates to government and governmental ability to enact environmental change through policy.

The person who received the single most tweets was @RishiSunak (571), with the peak occurring on July 6. Commenters looked for accountability in how taxes were being spent particularly in relation to the announced financial support packages for businesses affected by the pandemic. Commenters most frequently discussed areas such as imposing conditions on polluting enterprises and the aviation industry being subject to environmental conditions. The pandemic and its impact on business is seen by many commenters as an opportunity not to return to “business as usual” and refocus the economy towards a greener agenda.

GOVERNMENT



Topic 1: Government

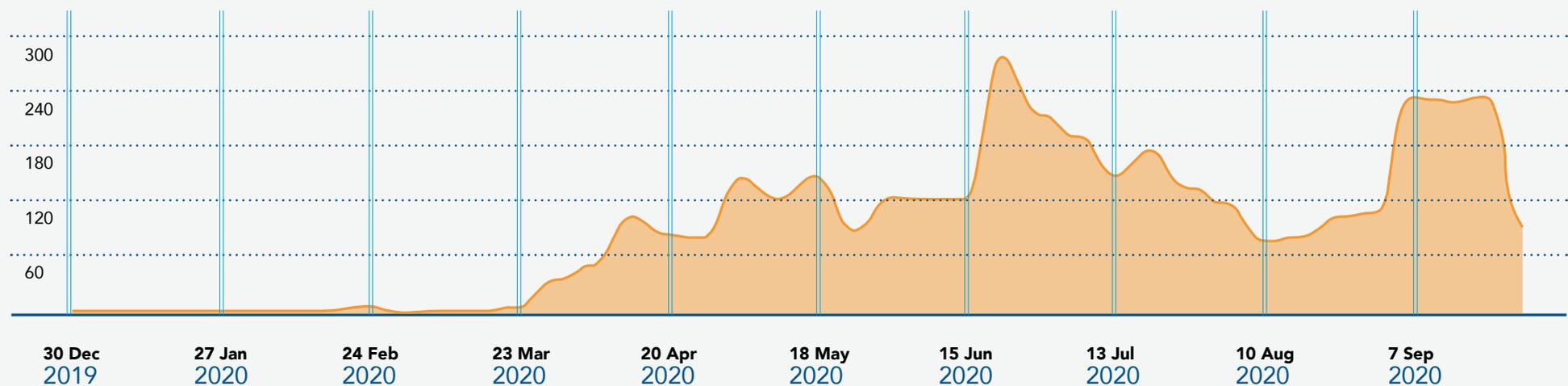
Net zero in relation to the UK government target is a constant topic from the end of March. This is also the case for the net zero discussion overall:

19% of all net zero comments are in relation to the UK government targets and there is concern about the ability to achieve them.

Is the **government** really serious about **net zero** & nature?
The PM's speech today isn't reassuring. We need a **net zero** test for new public expenditure:
bit.ly/2NFKzw2 1/pic.twitter.com/FNE7JwM0en

RESULTS OVER TIME

3.6K RESULTS



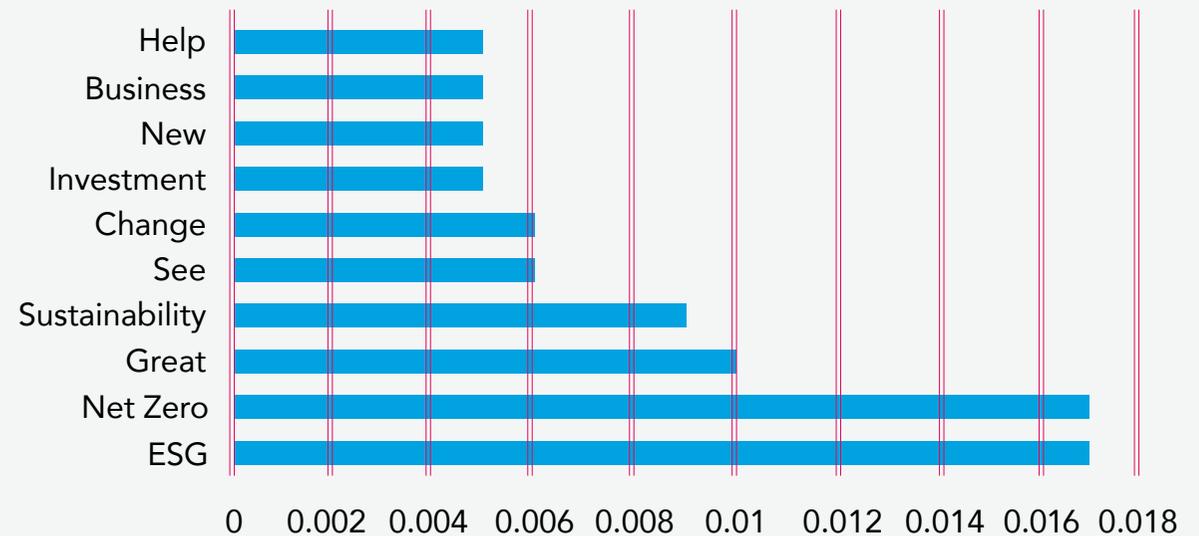
Topic 2: Business commitment

The second topic is in relation to business and business commitment to sustainability. There is clear support for businesses that pledge to meet environmental targets, whilst those that do not (for example Boohoo) are featured in negative commentary.

There is positive support by commenters for fuel companies Shell, Total, and BP for their net zero commitments. This is also the case for Octopus, the utility company, and its Agile tariff. Company environmental pledges are shown to be well received by the public, but they also appear to be a source of pride for employees. As can be seen below, employees of PwC and Unilever have used Twitter to express their pride and approval for their employers.

@PwC goes #NetZero!!!! Proud to be part of a firm walking the talk! #raisingambition

BUSINESS COMMITMENT

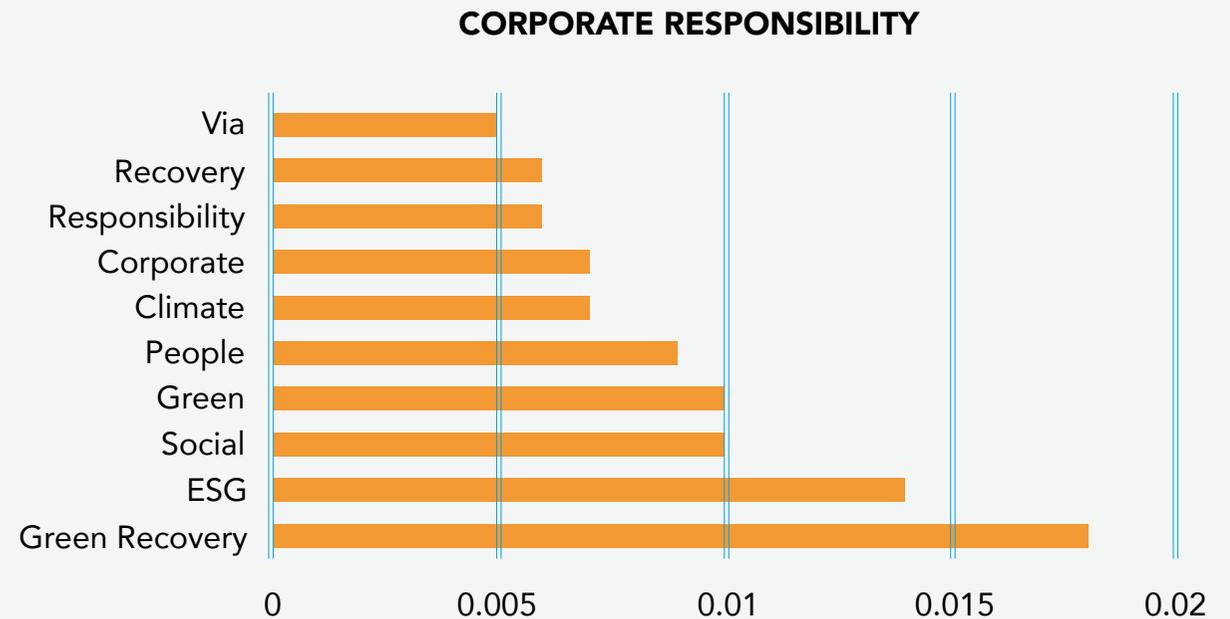


SO excited to see @Unilever launch our latest #LowCarbon commitment! It takes the perfect mix of #Creativity, boldness & #Purpose to reimagine the future. Looking forward to seeing what a world like this might look like #OurCleanFuture

Topic 3: Corporate responsibility

The third topic centers on corporate responsibility. This differs from topic two (business commitment), as it relates to the aggregate actions of all companies, while business commitment is focused more on individual business-level actions.

ESG is frequently referred to as a way for investors to differentiate between businesses by valuing their stance on the environment as well as financial results. The presence of #greenrecovery within the topic points to commenter belief that business plays a large role in stimulating economic growth through environmental initiatives.

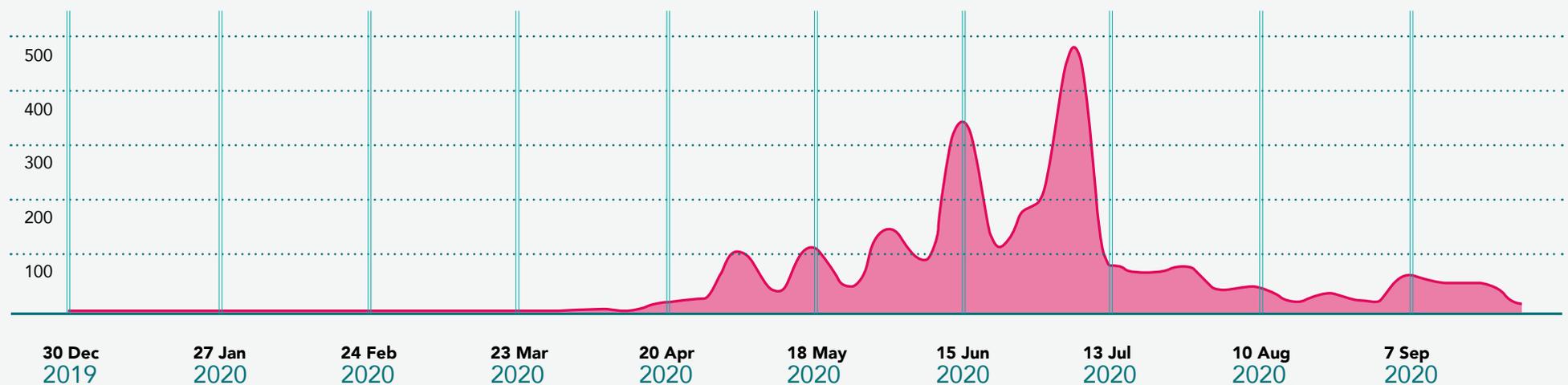


Topic 3: Corporate responsibility

The below graph tracks the hashtag across the monitored timeframe. As can be seen, the usage of the hashtag (like the rest of the data in the sample) increases throughout the lockdown period. However, after July it decreases, and usage does not increase alongside the rest of the dataset. This leads to the question of whether the green recovery has longevity in the mind of the public.

RESULTS OVER TIME

2.3K RESULTS



Conclusion

The pandemic has brought into sharp focus how exposed we are as a society to natural threats. As we look to recover, it is clear that keywords and consumer sentiment highlight the importance of a green recovery – not a business-as-usual reboot, but an opportunity for government to prioritize green policy goals for environmentally friendly solutions and the net zero transition.

There is clear signalling and demand for responsible businesses that embrace sustainability and set ambitious targets that provide a long-term benefit to all. Frequent mention is also made of ESG, which points to the growing use of these criteria as a credential to differentiate businesses by their environmental and social positioning. Even though there are ebbs and flows in the visibility of ESG, sustainability, and green recovery in public opinion across the nine-month review period, these words and their importance are shaping our conversation – and are here to stay.



About ICF

ICF (NASDAQ:ICFI) is a global consulting services company with over 7,000 full- and part-time employees, but we are not your typical consultants. At ICF, business analysts and policy specialists work together with digital strategists, data scientists and creatives. We combine unmatched industry expertise with cutting-edge engagement capabilities to help organizations solve their most complex challenges. Since 1969, public and private sector clients have worked with ICF to navigate change and shape the future. Learn more at [icf.com](https://www.icf.com).

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