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INSIGHTS

February 2025

From Climate Attitudes to Action

Investigating the Global Say-Do Gap



The Climate Paradox

Carbon dioxide (CO₂) concentrations in the atmosphere continue to rise, despite overwhelming scientific consensus and widespread public knowledge about the devastating consequences of climate change. This paradox persists even as six (soon to be seven) out of nine planetary boundaries have been breached. Climate action remains insufficient at all levels – international, national, organizational and individual – failing to keep pace with the severity of the environmental crisis. Understanding public awareness, attitudes and behaviors toward climate action is hence critical for advancing more effective policies and business strategies that drive substantial change.

Despite the growing global awareness of climate change and the acknowledgment of its anthropogenic origins, behavioral changes in consumer actions have been limited. Our previous white paper, Green Hearts to Green Carts: Bridging the Say-Do Gap for Climate Conscious Consumption explored potential explanations for the discrepancy between consumer awareness of climate change and their actual purchasing behaviors – a phenomenon known as the "say-do" gap. Key barriers that were identified include financial constraints, perceived inconvenience or effort in selecting sustainable products, doubts about the quality of "green" alternatives and widespread distrust stemming from corporate greenwashing. The white paper underscored the importance of household consumption patterns, which contribute substantially to global emissions, and highlighted how even small shifts in consumer behavior could drive meaningful progress towards global climate targets. We concluded with a call for further research, particularly via large-scale consumer surveys and experiments, to understand drivers and inhibitors of sustainable consumer behavior.

This follow-up study, *From Climate Attitudes to Action: Investigating the Global Say-Do Gap*, builds on those findings by presenting initial insights from a large-scale global survey across 21 countries. The survey provides insights into consumer attitudes, behaviors and the barriers that prevent consumers from adopting sustainable practices with the aim of informing businesses and policymakers on strategies to effectively close the say-do gap and enhance green consumption.

Specifically, while significant research has explored climate awareness and the factors influencing pro-environmental behaviors, a substantial gap exists in understanding the global nature of the disparity between individuals' stated attitudes and their behaviors – known as the say-do gap. This research aims to investigate how climate attitudes and behaviors vary globally. Addressing this gap is critical, as tackling climate change requires coordinated international efforts, and countries differ in cultural norms, economic conditions, policy frameworks and access to information and resources.

This study addresses three core questions to understand the global say-do gap more deeply:

- 1. How do climate attitudes vary across demographics and regions?
- 2. To what extent do these attitudes align with consumption behaviors?
- 3. How do socioeconomic factors influence climate-friendly actions?

To address these questions, a team from Saïd Business School, University of Oxford, and the University of Hamburg, with financial support from Investcorp, conducted a global survey on climate awareness, literacy and action. The survey sampled over 22,000 respondents across 21 countries, using a representative sample by age, gender and income, and was translated into local languages. Respondents answered over 50 questions about their climate attitudes and consumption behaviors, focusing on four key areas: transport, fashion, food and durable goods. A particular emphasis was placed on the say-do gap, measuring self-reported attitudes toward climate change (CCA) and climate-friendly consumption behaviors (CCB). This white paper highlights some of the initial findings.

Finding One: Climate Scepticism Remains

The survey reveals persistent climate scepticism, particularly in developed nations such as Australia, Germany, the Netherlands, Sweden and the USA, where over a quarter of respondents expressed doubts about the existence of climate change and a significant proportion question whether human activity causes climate change (see Figures 1 and 2).

These results are striking, given the high levels of education and access to information in these countries. Figure 1 shows that scepticism about climate change's reality is relatively high in these developed countries, where over 25% of respondents remain uncertain. Figure 2 highlights a similar trend: about 10% of respondents in Australia, Denmark and the Netherlands question whether climate change is human caused. These findings suggest that even in regions with advanced education and scientific resources, cultural, political and psychological factors may play significant roles in shaping climate perceptions.



Figure 1. Climate scepticism remains in several developed countries

Figure 2. Human causes of climate change still questioned by a minority

This figure shows the proportion of responses of "a little", "some" and "a lot" across 21 countries to the question: "How much of climate change do you think is caused by human activity?"



Figure 3 explores to what extent political and ideological leanings, education, a country's strong reliance on employment in emissions intensive sectors and psychological distance – the idea that climate change impacts are perceived as distant in time or geography – influence climate change perceptions and affect belief in its urgency or cause. The Figure reveals that the percentage of respondents in each country employed by emissions intensive sectors is inversely related to scepticism, as is the level of education, whereas the political leaning is virtually unrelated, and psychological distance is strongly positively related. Specifically, many respondents, particularly in Australia, Japan and the USA, report that they have not observed noticeable changes in local weather patterns, which may contribute to a perception that climate change is a distant threat. This "psychological distance" may lead individuals to view climate change as an abstract or future issue, reducing their sense of urgency.

Figure 3. Psychological distance as one major factor associated with climate scepticism

This figure shows the association of respondent characteristics (i.e., employment in emissions intensive sectors (Panel A), education (Panel B), political leaning (Panel C), and psychological distance (Panel D)) with the degree of climate scepticism.



Finding Two: Willingness to Take Action Varies By Region

When asked about their willingness to act on climate issues, over 10% of respondents in countries such as Australia, Germany, Japan, the Netherlands, Sweden and the USA express reluctance to take any action. Figure 4 illustrates varying degrees of willingness across countries, with certain populations, notably in developed countries, expressing limited commitment to engage in climate actions.

Figure 4. Respondents in developed countries are more likely to express reluctance to take climate action

This figure shows the proportion of responses of "(strongly) disagree", "neither agree or disagree" and "(strongly) agree" to the question: "To what extent do you agree with the following statement: I am willing to take actions to limit climate change."



Figure 5 further shows that respondents in these regions are more likely to associate climate action with a potential decrease in living standards. This perception may stem from concerns that eco-friendly policies could raise costs, disrupt industries or require personal sacrifices.

These findings highlight the need for clear communication around the benefits of climate action and the potential economic gains of sustainability initiatives. Addressing the perceived trade-off between climate action and economic well-being could increase willingness to engage in climate-positive behaviors. Policymakers and business leaders can work to clarify that sustainable shifts can yield economic and environmental benefits, thus reframing climate action as a path to prosperity and innovation rather than sacrifice.

Figure 5. Respondents in developed countries are more likely to associate climate action with a decrease in living standards

This figure shows the percentage of "(strongly) disagree" responses regarding a willingness to take climate action (Figure 4) and the percentage of respondents expecting negative effects of climate action on their living standard in response to the question: To limit the effects of climate change, humanity will need to stop emitting greenhouse gases to the atmosphere. What do you think will be the effect on the standard of living in your country?



Willingness to take action and expected effects on living standards by country

Focus on Variable One: The Climate "Friendly" Index

Beyond attitudes, this study sought to understand climate-related consumer behavior by developing a Climate-Friendly Consumption Behavior (CCB) index. This index reflects respondents' proactive approaches to eco-conscious consumption such as considering the environmental impact of daily purchases. Specifically, the CCB reflects an individual's self-reported proactive approach and mindset toward making environmentally sustainable consumption decisions aimed at reducing their carbon footprint, as captured by statements like "I consider the well-being of our planet in my daily consumption decisions." Figure 6 reveals that demographic factors, such as gender, education, age and parental status, are predictors of climate-friendly behaviors, with women, educated individuals and parents showing greater eco-consciousness. Figure 7 contrasts these behaviors across countries, highlighting that emerging markets surpass developed nations in self-reported climate-friendly consumption. This may reflect a combination of societal norms, government initiatives and the tangible impacts of climate change on daily life in these regions.

Figure 6. Young educated women with children have the most climate-friendly consumption behavior (CCB) index value This figure shows the proportion of women, respondents with a college degree, respondents under 35 years of age and those with children by low and high CCB index value divided at the median.





Figure 7. The global south reports higher than average climate-friendly consumption behavior compared to the global north This figure shows the mean CCB index across countries and the global average.

These findings suggest targeted approaches in climate communication, policy and product offerings may be needed to drive behavior. The higher CCB scores in emerging economies might reflect stronger social norms around environmental action, greater exposure to climate impacts or – since the CCB index captures self-reported behaviors – an under-estimation of respondents' actual climate footprint. We will explore the latter in more detail in follow-up work. In developed markets, policy interventions that make eco-friendly options more accessible and relatable could enhance adoption rates. The findings indicate that providing incentives, increasing product transparency, and improving climate literacy could empower consumers to engage in more sustainable consumption practices.

Focus on Variable Two: The Climate Change "Attitude" Index

Next, the study addresses the question to what extent there is a gap between climate-related attitudes and behavior. To understand this, we created a climate change attitude (CCA) index. CCA refers to an individual's perception of the seriousness of climate change, the recognition of human activities as its primary cause and the belief in the urgent need to reduce greenhouse gas (GHG) emissions. For instance, we asked respondents to assess statements such as "Climate change poses a serious threat to humanity."

Figure 8. A significant "Say-Do Gap" exists

This figure shows the average difference between the CCA and CCB, named the "Say-Do" Gap.



The Say-Do Climate Index

The comparative analysis between the CCA and CCB indices reveals a gap between individuals' stated concerns about climate change and their self-reported climate-friendly behaviors (Figure 8). For example, while many respondents report being willing to act, a substantial proportion, particularly in high-income countries, fail to take concrete steps (Figure 9).

One important consideration is that both the CCA and CCB indices rely on self-reported attitudes and behaviors, which may capture varying degrees of social desirability bias or 'image concerns' across countries, rather than actual behavior gaps. Future research will aim to explore these variations in greater depth to provide a more comprehensive understanding of the say-do gap.

Figure 9. The Say-Do Gap is the highest in the global north

This figure shows the average Say-Do Gap by country in 21 countries.



Furthermore, findings in Figure 10 reveal an interesting pattern in consumer behavior regarding climate-friendly choices: while higher CCA scores correlate with reduced meat consumption and increased energy-efficient behaviors at home (such as turning off lights and appliances), they do not translate to significant reductions in the frequency of flights or purchases of clothing and apparel.

This discrepancy suggests that consumers may be more willing to adopt eco-friendly behaviors that are relatively low-effort and can be seamlessly integrated into daily routines, such as adjusting dietary habits or reducing energy usage at home. However, more lifestyle-intensive changes, like limiting air travel or reducing clothing purchases – actions that often involve convenience, status or leisure considerations – appear less influenced by climate attitudes. This indicates that while awareness and concern about climate change can drive certain sustainable practices, behaviors tied closely to personal lifestyle or comfort may require additional incentives, structural changes, or cultural shifts to align with climate-conscious values.

Figure 10. The Say-Do Gap is higher for travel and apparel consumption and lower for food and home energy consumption

The figure groups respondents according to their level of CCA (from low to high on the x-axis) and shows the proportions of respondents with the stated consumption level for each category (on the y-axis).



Barriers to Climate-Friendly Consumption

Our survey also identifies key barriers that prevent climate-friendly consumption. Figure 11 illustrates that respondents on average perceive cost and insufficient information as the primary obstacles to eco-friendly consumption. The bar chart represents the average percentage of respondents across all countries that "agreed" or "strongly agreed" that the particular barrier prevents them from a more climate-friendly lifestyle. In particular, respondents report difficulty verifying the environmental impact of green products, often due to vague or inconsistent labelling practices. Other major barriers are the lack of available climate-friendly alternatives and the culture in respondents' countries not being conducive to a climate-friendly lifestyle. The line chart in the figure shows the standard deviation across countries providing insights about the degree of agreement. There seems to be strong agreement that cost and knowledge are the major barriers and that the lack of social support or unclear personal benefits are less important. On the other hand, more disagreement exists across countries about the role of availability of climate-friendly alternatives, convenience and lack of acceptance that climate change is caused by human activity.

Figure 11. Cost and insufficient information are perceived as the primary obstacles to eco-friendly consumption

This figure shows the mean and standard deviation across countries of the proportion of respondents naming the aspects on the x-axis as important barriers to their climate-friendly consumption.



Figure 12 provides a more detailed view of the barriers to climate-friendly consumption across various countries, highlighting significant cross-country percentage differences that reveal unique regional and cultural challenges to adopting sustainable behaviors.

Across countries, the willingness to pay varies somewhat. For example, India, Saudi Arabia, Japan, Turkey and France state it as an important barrier, whereas it is less of a concern in Denmark, Mexico and South Africa. In India and Saudi Arabia, respondents highlight that they are not able to afford climate-friendly alternatives. Knowledge about sustainable options varies as well with Japan, Saudi Arabia and India stating that lack of knowledge is a significant concern. The availability of climate-friendly options is a major barrier in Saudi Arabia, Indonesia, India, Mexico, Brazil and Turkey, whereas it is less of a concern in the Netherlands, Germany, Sweden, the UK and Japan.

To overcome these barriers, policy interventions that improve transparency around eco-friendly products, incentivize green purchases and improve climate literacy could be helpful. This could empower consumers with both the knowledge and economic means to choose climate-friendly options more confidently. Less of a concern are the lack of agency – the perception that one's actions have no impact – and hopelessness that climate change cannot be stopped. The findings, however, also highlight that policy actions and business responses need to address and be tailored to the relevant barriers in each country.

Figure 12. Barriers to climate-friendly consumption across countries vary sharply

This figure shows cross-country percentage of importance of the barriers to climate-friendly consumption where color coding is normalized within each barrier (columns).

Australia	0.57	0.60	0.50	0.29	0.25	0.29	0.31	0.35	0.32	0.19	0.27	0.29	0.23		1.0
Brazil	0.55	0.55	0.46	0.52	0.63	0.33	0.34	0.25	0.23	0.34	0.23	0.24	0.24		
Canada	0.54	0.54	0.48	0.31	0.26	0.32	0.31	0.34	0.27	0.19	0.24	0.22	0.22		
China	0.54	0.52	0.46	0.42	0.36	0.51	0.52	0.39	0.38	0.40	0.37	0.36	0.33		
Denmark	0.43	0.41	0.50	0.23	0.18	0.22	0.22	0.27	0.23	0.14	0.25	0.20	0.17		0.8
France	0.58	0.59	0.40	0.37	0.34	0.32	0.32	0.42	0.27	0.22	0.23	0.22	0.25		
Germany	0.52	0.51	0.37	0.23	0.23	0.29	0.25	0.22	0.27	0.14	0.28	0.27	0.24		
India	0.64	0.61	0.55	0.55	0.47	0.49	0.48	0.53	0.40	0.47	0.39	0.39	0.41		
Indonesia	0.50	0.46	0.35	0.58	0.38	0.27	0.33	0.12	0.19	0.25	0.09	0.12	0.13		0.6
Italy	0.53	0.54	0.39	0.35	0.38	0.28	0.29	0.24	0.24	0.21	0.20	0.18	0.18		
Japan	0.59	0.58	0.60	0.28	0.27	0.34	0.24	0.31	0.23	0.25	0.27	0.22	0.19		
Mexico	0.48	0.52	0.47	0.55	0.61	0.37	0.34	0.29	0.25	0.42	0.23	0.22	0.20		
Netherlands	0.51	0.47	0.42	0.23	0.23	0.27	0.27	0.22	0.30	0.14	0.27	0.27	0.25		0.4
Saudi Arabia	0.59	0.60	0.57	0.60	0.49	0.52	0.54	0.36	0.38	0.47	0.38	0.38			
South Africa	0.48	0.53	0.52	0.44	0.43	0.38	0.36	0.37	0.27	0.32	0.22	0.22	0.22		
Spain	0.54	0.52	0.37	0.35	0.43	0.27	0.30	0.22	0.26	0.26	0.22	0.20	0.18		
Sweden	0.52	0.50	0.49	0.25	0.23	0.26	0.25	0.29	0.28	0.18	0.25	0.25	0.23		0.2
Turkey	0.58		0.53		0.53	0.33	0.32	0.24	0.31	0.32	0.25	0.26	0.28		
UAE	0.55	0.55	0.52	0.47					0.35	0.41			0.33		
UK	0.51	0.48	0.46	0.28	0.31	0.27	0.25	0.30	0.24	0.18	0.20	0.21	0.18		
USA	0.52	0.53	0.51	0.36	0.39	0.36	0.34	0.36	0.33	0.23	0.29	0.27	0.26		0.0
Willingness to pay Knowledge Availability Perceived Cultural Support Functionality Personal Convenience Convenience Social Support Hope Convenience Social Support Hope							0.0								

Implications for Policy & Business

The results of this study underscore the critical need for country-specific and context-sensitive climate communication and measures that bridge the gap between climate attitudes and action. Policymakers and businesses should consider designing strategies that not only inform the public and raise awareness but also address the behavioral barriers – such as affordability and perceived inconvenience – that prevent climate-friendly actions.

The findings of this study offer several actionable insights for practitioners aiming to bridge the gap between climate awareness and meaningful action.

- First, they underscore the importance of tailored interventions that move beyond general climate knowledge and instead target specific behavioral motivators and barriers relevant to different demographic and regional contexts. Organizations can leverage these insights to design communication strategies that resonate with local values and concerns, making climate action more relatable and urgent.
- Furthermore, incorporating digital tools and interactive platforms could significantly enhance engagement, offering individuals
 immediate feedback on their climate-positive behaviors and encouraging sustained action. For companies, NGOs and public
 institutions, this approach presents an opportunity to foster a culture of accountability and commitment to sustainable
 practices through transparent, data-driven climate initiatives.
- Finally, by adopting a collaborative, multi-stakeholder approach, practitioners can facilitate a broader ecosystem of climate literacy that empowers communities, promotes inclusivity and accelerates the collective transition toward a low-carbon future. This research, therefore, provides a foundation for designing more effective climate engagement strategies that turn awareness into action at scale.

Future Research & Next Steps

This study provides a strong foundation for further inquiry into the dynamics of climate awareness and action while opening several promising avenues for continued research using our dataset. First, to deepen our understanding of the antecedents and consequences of climate scepticism, we plan to enhance our analysis by integrating secondary data at the country level. By incorporating metrics such as national climate action scores, government spending on climate initiatives and recent political developments related to environmental policies, we aim to contextualize individual climate attitudes within broader socio-political and economic frameworks. This layered analysis may offer insights into how national contexts influence climate scepticism and the factors that encourage or inhibit pro-environmental behaviors.

Second, our survey included experimental modules designed to explore the say-do gap through targeted scenarios. These experimental data, which were not included in this initial report, will allow for a more nuanced examination of the psychological and situational factors influencing climate action. By analyzing how individuals respond to various prompts and hypothetical situations, we hope to better understand the underlying mechanisms that drive or deter sustainable behaviors, thereby providing actionable insights into closing the say-do gap.

Third, in addition to calculating the say-do gap between climate attitudes and self-reported behaviors, we also collected survey data to estimate participants' actual carbon footprints without their awareness. While this analysis is not included in this paper, initial findings yield promising insights for future research. Specifically, they allow us to investigate the extent to which the perceived say-do gap (based on self-reports) differs from the actual say-do gap (based on objective estimates). This comparison can help uncover how aware individuals are of the true consequences of their behaviors – essentially, the "gap within the gap." Understanding this dimension of awareness is crucial, as it may be influenced by factors such as climate change literacy, which leads to the fourth avenue for next steps.

Fourth, we have gathered a wealth of data on both self-reported and objectively assessed climate literacy, which shows intriguing patterns pointing to global disparities in climate knowledge. In future analyses, we intend to further explore these literacy data, particularly in relation to the variations across countries and regions. Understanding these differences can illuminate how knowledge around climate issues shape individual and collective climate actions. We anticipate that these future investigations will contribute to a more comprehensive and culturally sensitive understanding of climate awareness and literacy, providing valuable insights for global climate education and policy strategies.

Appendix – Methodology

Climate Change Attitude Index (CCA)

CCA refers to an individual's perception of the seriousness of climate change, the recognition of human activities as its primary cause, and the belief in the need for urgent action to reduce GHG emissions. The index is empirically tested and validated.

Variable Name	Label
att_4_cc_threat	Climate change poses a serious threat to humanity.
att_4_cc_real5	Human activity (e.g., the burning of fossil fuels, agricultural production, consumption) is responsible for emitting greenhouse gases that cause climate change.
att_4_cc_real6	We need to cut greenhouse gas emissions to stop temperatures from rising.

A 5-point Likert scale was applied, ranging from 'completely disagree' (1) to 'completely agree' (5).

Self-Reported Climate-Friendly Consumption Behavior Index (CCB)

CCB reflects an individual's self-reported proactive approach and mindset towards making consumption decisions that are environmentally sustainable and aimed at reducing their carbon footprint. The items are a mix of self-reported intentions and behavior. The index is empirically tested and validated.

Variable Name	Label
ccb1	I constantly think about how to make my lifestyle more climate-friendly.
ccb1	I make an effort to avoid buying products or services that harm the planet.
ccb1	I consider the well-being of our planet in my daily consumption decisions.
ccb1	I take initiatives to act in climate friendly ways in my daily life.

A 5-point Likert scale was applied, ranging from 'completely disagree' (1) to 'completely agree' (5).

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