

Climate Reality Check

How climate pledges shape brand reputation and sentiment, as UNGA and Climate Week approach

A cross-industry analysis of corporate climate commitments, media sentiment, and the gap between stated goals and measurable action — powered by Signal AI data across 50+ brands and 7 sectors.

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HOW WE DEFINED INTENT & EXECUTION

Intent

A strategic initiative is a structured **effort to achieve key organizational priorities**, defining the vision, values, and aspirational goals of the company.

Execution

A corporate execution defines the "how": the structured, day-to-day work, resource allocation, and **operational processes required to turn that intent into a reality.**

METRIC	WHAT IT MEASURES	HOW TO INTERPRET IT
All Mentions	Total brand media volume across all topics	Scale of overall media presence — not intent or execution-specific.
Net sentiment	Net sentiment across all brand coverage	How positive a brand's media coverage is overall.
Media type	The volume of coverage achieved in a specific type of media (Print, Online and Broadcast).	Which formats are carrying intent and execution coverage and to whom.
Tier 1 Penetration	Intent or execution articles in premium / flagship media as % of total	Quality indicator: are intent or execution stories reaching the publications that matter?

Executive Summary

Most organisations know what climate pledges they have, but far fewer know how those pledges are actually impacting their reputation.

This report measures the reputational return for environmental commitments using Signal AI's media intelligence platform, tracking coverage across news, trade press, and digital publications for 50+ brands across 7 sectors over a 6-month period. We look not just at volume, but at sentiment lift: **What difference does moving from climate intent to operational execution actually make to how a brand is perceived?**

The findings are unambiguous. Across every sector in this study, execution coverage generated materially higher net sentiment than intent or pledge coverage. **But the difference between effective and ineffective climate comms is substantial.** The strongest-performing brands consistently share the same characteristics:

- Independently verified and audited results rather than self-reported targets
- Tangible, visible consumer proof rather than invisible backend operational shifts
- Concrete interim milestones backed by reallocated capital instead of distant 2050 goals
- Radical transparency and target accountability rather than reliance on carbon offsets

The report also shows ambition without execution now damages reputation. **High-profile pledges consistently underperform when they fail to deliver credible operational proof or Tier 1 media penetration.** At the same time, reputational risk around climate messaging is rising rapidly. **Regulatory enforcement, litigation, consumer distrust, and scope 3 scrutiny increasingly influence how environmental performance is covered and perceived.**

The conclusion is clear: **climate strategy has become a reputation management tool as much as an operational imperative.** Brands that measure sentiment, bridge the execution gap, and treat climate commitments as a platform for verified delivery rather than PR ambition are generating materially stronger reputational outcomes than their peers. If there is one metric every CSO, Communications Director, and Business Leader should know, it is how these climate actions affect their company sentiment in media conversations. **Because in 2026, climate leadership is no longer defined by ambition alone, it's defined by the quality of the execution it creates.**

Learn more about Signal AI





SECTION 01 • MARKET CONTEXT

Managing climate pledges in 2026

A critical gap between ambition and execution, and why it just became a material risk.

Accountability over ambition: The new climate narrative

01

The 2026 Climate Week converges with the UN General Assembly (UNGA) in New York.

In September, when executives, investors, and world leaders gather in New York, the narrative will be different. The transition from making promises to keeping them is the defining subject of 2026, with sessions concentrating on bridging the gap between commitment and delivery rather than establishing new goals. The topic in the room has shifted from "what will you pledge?" to "what have you actually done?" after ten years of declarations.

02

"Greenwashing" allegations and reputational concerns move from soft concern to material risk.

As skepticism towards environmental claims grows among consumers, investors, and regulators, "greenwashing" has evolved into a legal and financial issue. This presents a dilemma for businesses: overstating success invites legal repercussions, while underreporting risks loses trust. According to EcoVadis, approximately 87% of businesses are either maintaining or increasing their ESG investments, yet nearly a third are deliberately discussing it less.

03

Staying silent is not a safe alternative. Credibility only comes from demonstrated delivery.

Many companies are retreating behind "greenhushing" in response to criticism. However, academics caution that the trust that is the foundation of long-term value development is undermined by this silence. The only long-lasting position is sincere follow-through that can be confidently articulated, which is precisely what concentrating on delivery (rather than just messaging) makes feasible because both overclaiming and being silent incur risk.

What stakeholders demand

Investors & analysts

Climate materiality is now actively enforced through stewardship and proxy voting rather than just supported in principle. Investor coalitions like Climate Action 100+ and proxy advisers are directly pressuring high-emitting companies on governance, emissions disclosures, and board-level climate oversight.

NGOs & activists

Policy rollbacks like the EU Sustainability Omnibus are pushing NGO's back toward litigation to influence corporate strategy. Simultaneously, ESG legal actions are becoming increasingly sophisticated, expanding beyond corporations to directly target board directors, investors, and professional advisers.

Consumers & employees

After years of empty messaging, consumers and employees now discount sustainability claims by default. This has widened the "say-do" gap: strong verbal support for sustainable brands but weak follow-through at the register due to price sensitivity and distrust. Trust must now be earned through concrete evidence and independent, third-party proof, rather than mere pledges.

Policymakers

Global sustainability reporting is shifting into a multi-speed landscape as major Western federal regulators ease corporate burdens while sub-national and international bodies accelerate standards. European updates have dramatically narrowed scope and cut required data points by 61%, and the US SEC has proposed repealing its climate disclosure rules.

The cost of inaction: from pledges to proven results

The world's biggest corporations are experiencing a hidden crisis that might decide whether or not the Paris Agreement's targets of reducing emissions by 50% by 2030 and achieving net-zero emissions by 2050 can still be met.

As scrutiny intensifies, the distance between ambition and execution is becoming the story. Media coverage of greenwashing has surged, sentiment is softening, and third-party verification remains rare.

The result: **pledges alone no longer earn trust.**

The execution gap

Most transition plans lack the depth, capital reallocation, and scope coverage to meet real-world goals.

7% of companies meet the basic "starting line" integrity criteria for a credible target

98% lack credible plans to shift capital away from carbon-intensive assets

Net Zero Tracker. (n.d.). *Net Zero Tracker*
TPI - Global Climate Transition Centre. (n.d.). *TPI - Global Climate Transition Centre*.

The trust deficit

Consumer distrust is at an all-time high as corporate behaviour falls behind public relations.

55% only sometimes accept a brand's sustainability claims; 25% never trust them

30% cite inadequate information as a barrier to sustainable purchases

Shorr. (2025, January 30). *The 2025 Sustainable Packaging Consumer Report*.
BlueYonder. (n.d.). *Consumer Sustainability Survey*.

The commercial imperative

Companies that turn promises into action gain share and premium pricing while cutting future regulatory cost.

39% of consumers have switched brands for better eco-friendly packaging

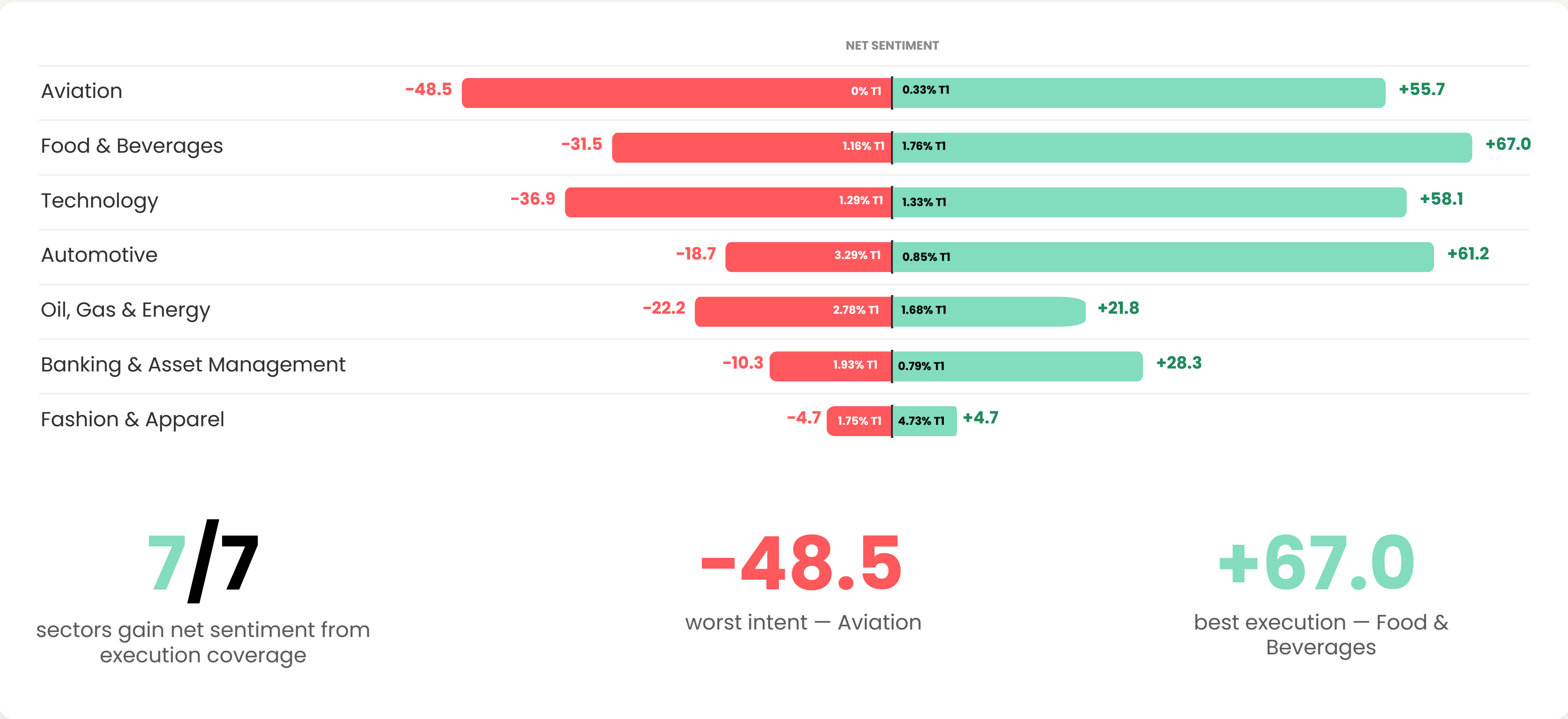
12k+ businesses expected to hold SBTi-validated goals by end of 2025

Shorr. (2025, January 30). *The 2025 Sustainable Packaging Consumer Report*.
ESG Dive. (2026, April 9). *Companies with net-zero and near-term climate goals up 61% in 2025: SBTi*.

What's promised. What's delivered. What the numbers show.

Across all sectors, following through on pledges result in a net positive for reputation. The range between the best and worst performers is enormous, and the factors that separate them are consistent.

Intent vs. execution: Cross-sector performance analysis



Net sentiment on a -100 to +100 scale · T1 pen. = tier-1 publication penetration · Signal AI data, 2026.

What moves a negative sector back toward zero

What softens the backlash

pulls sentiment up

A real apology and accountability; not a re-commitment

Owning the miss lands far better than quietly restating the old target.

Concrete interim milestones with dates

“40% by 2028, audited annually” reads as credible; “we remain committed” reads as spin.

Third-party validation

SBTi-approved targets, external auditing, CDP disclosure — the single biggest credibility signal.

Transparency about why they missed

Explained failure beats unexplained; unexplained beats hidden.

Leadership accountability tied to the target

Exec pay linked to climate KPIs.

What backfires

further drives sentiment down

↓ **Donations and carbon offsets** read as buying indulgences: paying to look green instead of cutting your own emissions.

↓ A sector leaning on offsets rather than operational change scores **more negative, not less.**

↓ **Celebrity-fronted campaigns** and glossy sustainability reports with no numbers.

The classic greenwashing tell: spend to appear green, backlash deepens.

Reputational damage control: Lessons from Aviation & Fashion

● AVIATION SERVICES · WHAT BACKFIRED

EU Carriers: The high cost of the "fly neutral" spin

Early in 2026, European airlines encouraged customers to purchase carbon offsets or make small contributions to Sustainable Aviation Fuel (SAF) at the point of sale in an effort to allay concerns about climate change. Although SAF accounted for only 1% of real fuel consumption, the narrative claimed that individual ticket add-ons might make flying "neutral" or "more sustainable."

Instead of generating goodwill, **this strategy triggered severe legal penalties**. In March 2026, KLM was fined €401,000 by a Danish court for engaging in deceptive commercial practices. The court found that offset claims gave consumers the false impression that travel was environmentally friendly while fossil fuel consumption persisted.

AVIATION SERVICES

BRAND	NS	SOV
KLM	-65.7	0.042%
Ryanair	-36.8	0.008%
Lufthansa	-25	0.002%

WHAT DIDN'T WORK

Strategy & Tone: Leaning on consumer-funded offsets and defensive "fly neutral" messaging.

Verification: Reliance on self-reported offset schemes that failed external scrutiny.

Outcomes: Aviation was hit with court fines, ad bans, and mandatory policy overhauls.

● FASHION & APPAREL · HOW NEGATIVE INTENT WAS SOFTENED

Transparency as defense: Surviving anti-greenwashing rules

Fast-fashion overproduction and criticism of H&M's ambiguous "Conscious Collection" range (which regulators denounced as spin) caused severe damage to the company's reputation. Primark and Lululemon faced similar backlash, facing heavy regulatory pressure from the EU's new anti-greenwashing rules in the first half of 2026.

Even though fast fashion is still inherently under scrutiny, H&M and Primark were able to significantly reduce activist and regulatory reaction in comparison to rivals like Shein by successfully shifting the narrative from **baseless greenwashing** to **quantifiable operational transformation** through transparency on supply-chain misses, third-party validation, and concrete interim milestones.

FASHION & APPAREL

BRAND	NS	SOV
H&M	-15.8	0.019%
Primark	-18.3	0.160%
Lululemon	-3.3	0.258%

WHAT WORKED

Strategy & Tone: Pivoting to third-party SBTi audits and an operational narrative focused on supply-chain overhauls.

Verification: Anchoring its messaging in independent CDP disclosures.

Outcomes: Complying with EU Green Transition regulations by replacing misleading marketing language with factual information, despite initial challenges.

What amplifies a positive sector further

01 Independently verified, audited results

“Third-party confirmed we hit it” — not self-reported.

Audited figures withstand scrutiny. The “marking your own homework” criticism that subtly undermines the majority of sustainability claims is eliminated when an external body, such as an auditor, certifier, or ratings agency, signs off. In the announcement, identify the verifier; you gain credibility.

02 Tangible, visible proof

A product, plant, or fleet you can point to — an EV launch, first SAF flight, recyclable packaging on shelves.

Physical evidence provides media with more than simply citations. It transforms an intangible commitment into something that customers can see, utilize, or visit at a store. Compared to a figure in a report, visual evidence travels farther and is much more difficult to refute.

03 Beating the target early or exceeding scope

Over-delivery generates its own news hook.

Beating a target is a story; hitting it on time is anticipated and rarely news. Early or above-scope delivery gives you a new opportunity to make an announcement that is entirely unrelated to the initial commitment and indicates true capability rather than box-ticking.

04 Consumer-facing framing

Wins people can see in their own lives amplify more than backend supply-chain wins.

Frame the result around everyday experience — a lower bill, a cleaner product, a change customers actually notice — not internal metrics. Relatable wins get shared and remembered; supply-chain and procurement wins get filed and forgotten.

Driving reputational lift through visible proof

● FASHION & APPAREL · WHAT WAS LACKING

When technical success lacks consumer buzz

Patagonia accomplished a long-standing environmental engineering objective for its Spring 2026 line: increasing its polyester fabric blend to 94% recycled sources (partially using NetPlus® recycled ocean fishing nets) and making the entire new collection 100% PFAS-free by design.

Corporate partners, sustainability researchers, and ESG watchdogs praised the launch as a model of execution. However, **the victory didn't spark a wider cultural wave or viral consumer excitement outside of Patagonia's core base because it was essentially "invisible" on the product tag.**

WHY PATAGONIA LACKED EXTRA AMPLIFICATION

Invisible to the End Consumer: The win lives in the chemical formula, not a visible consumer design change.

Expected Pace, No "Early Beat" Hook: It was an expected regulatory migration rather than an early, unexpected target beat, so it lacked a dramatic news hook.

● FOOD & BEVERAGES · HOW POSITIVE INTENT WAS HEIGHTENED

Maximizing PR impact by connecting operations to the shelf

General Mills showed in its 2026 Global Responsibility Report (published in April 2026) how to combine real customer touchpoints with backend operational milestones to optimize favorable news coverage.

The announcement generated widespread, positive earned media across business and consumer press because **it bridged the gap between complex supply-chain metrics (zero-waste plants) and tangible consumer experiences (recyclable packaging in hand).**

PATAGONIA & GENERAL MILLS COMPARISON		
BRAND	NS	SOV
General Mills	+100	0.019%
Patagonia	+39.3	0.160%

WHY GENERAL MILLS EXCELLED

Tangible, Visible Proof: 95% of GM global product packaging by weight is now recyclable or reusable, positively impacting consumers daily in grocery stores.

Audited Operational Milestone: 100% zero-waste-to-landfill status, with third-party verified operational proof

Exceeding Scope: General Mills regenerative agriculture program surpassed 75% of its 2030 target years ahead of schedule.



SECTION 03 · STRATEGIC IMPLICATIONS

The way forward and what you can do

Strategic recommendations for communications & reputation
teams

Four strategic moves

01

From pledges to pathways

2050 targets now read as evasion. **Lead with interim milestones, CapEx behind them, and third-party verification.** SBTi's own standard has shifted from ambition to delivery.

02

Shareholder readiness

Pressure moved from the ballot to the back-channel. **Prep board alignment, CEO positioning, and scenario plans for private investor engagement, not just the AGM.**

03

Monitor peers

Track competitor comms for the quiet retreat: a softened target reframes the whole sector. **Have a "what we say if they walk it back" playbook ready.**

04

Build defensibility

Map every public claim to its evidence. Arm spokespeople with numbers, not adjectives. **Test: could we defend this to a regulator, NGO, and hostile journalist?**

The real-time monitoring imperative

01

Real-time alerts

Track greenwashing mentions, shareholder resolutions and regulatory enforcement. Early detection means rapid response.

02

Peer intelligence

Monitor competitor responses. Their wins and missteps become templates for strategy. Stay ahead of narrative shifts.

How Signal AI helps

Live NS, SOV and Tier 1 penetration tracking, benchmarked against peers, alerted in real time, and grounded in a baseline you can see on day one. Monitoring becomes a discipline, not a deliverable.

NEXT STEPS · WHAT YOU CAN DO

Your climate narrative shouldn't be a gamble.

Signal AI helps communications and marketing leaders understand how climate pledges shape brand perception, across media volume, sentiment, and Tier 1 coverage.

[Request a demo](#)



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