

Societal Shift



October, 2025

Understanding Public
Sentiment in an Age of Climate
and Economic Uncertainty



Globe
Scan



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Introduction

The transition to a low-carbon, nature-positive future is one of the most urgent and complex challenges of our time. Progress must occur across multiple dimensions: technological, financial, regulatory, and societal, among others. While innovation, finance, and policy are essential, the success of this transition ultimately depends on public support, cultural alignment, and emotional engagement with society.

GlobeScan's *Societal Shift* project explores how people around the world perceive environmental, climate, and nature-related issues, what motivates them to act, and how society can better prepare for this transition. This 33-market public opinion survey, along with expert roundtables, uncovers the emotional, psychological, and cultural dynamics that shape public engagement. It reveals that people respond best to messages that are clear, personally relevant, and emotionally resonant, especially those that connect environmental action to health, affordability, and simplicity. These insights highlight the importance of framing sustainability in ways that align with people's lived experiences and values.

Driving societal change requires more than awareness; it calls for deep listening, inclusive narratives, and strategies that reflect local cultures, priorities, and everyday realities. It also requires governments and companies to be visibly doing their part.

The average person on the street tells us that they expect action from the public and private sectors to enable the systemic changes they want to see. Experts emphasize the need for multiple levers – policy, storytelling, and emotional connection – to activate support and foster inclusive, culturally grounded engagement.

This report equips policy-makers, business leaders, communicators, educators, and civil society organizations with insights into evolving public sentiment amid climate and economic uncertainty globally and at the market level. It provides a strategic foundation for engaging society in sustainability transitions by helping leaders understand how urgency is felt, how emotions influence behavior, what actions are most useful, and how readiness varies across regions and generations.

The *Societal Shift* project is a *pro bono* initiative by GlobeScan in keeping with our purpose to co-create a sustainable and equitable future. Our greatest hope is that this becomes a public good and helps those working to create a better future be that much more effective in engaging the public.



Chris Coulter,
CEO GlobeScan



Public Perspectives: Key Findings

In order to capture public perceptions, societal trends, and attitudes toward climate and nature-related issues, GlobeScan conducted an online public perception survey in 33 markets. These results are distilled below and referenced throughout the report.

Discover the key findings



Economic Pressures Shape Environmental Attitudes and Limits to Action

While most people support environmental protection and view a healthy environment as vital to economic growth, rising living costs and financial insecurity are shaping public engagement with climate and nature issues. Few are willing to make financial sacrifices, revealing a tension between environmental aspirations and affordability. This highlights the need for policies and messaging that align sustainability with economic resilience.



The Global South Leads in Concern and Commitment to Change

Public opinion in the Global South reflects higher sensitivity to climate impacts and stronger willingness to support the transition to a green economy. Markets with economies that are more dependent on natural resources show greater urgency and readiness to act. In contrast, many industrialized nations exhibit lower levels of concern and less willingness to sacrifice, underscoring the need for differentiated strategies that reflect regional realities.



Emotional Responses to Climate News Are Mixed but Actionable

Environmental news evokes a complex emotional landscape filled with hope, fear, anxiety, and optimism. These emotions vary by region and generation, influencing how people engage with climate issues. Messages that combine evidence-based impact with simple, accessible solutions resonate most. In a world of uncertainty, people respond best to communications that offer clarity, predictability, and personal relevance.



Systemic Change is Supported While Personal Sacrifice Is Not

Survey data show strong support for systemic policies (e.g., international cooperation, regulations, etc.), but low willingness for personal sacrifice. People are looking for governments and companies to create a social infrastructure of support to help enable more individual and collective action.



Public Expectations for Leadership Are High, but Progress Is Seen as Limited

People expect governments, companies, and international bodies to lead on climate action, yet most feel their countries have made only modest progress when it comes to creating a sustainable economy. As global attention turns to COP30 and beyond, the call for bold, coordinated leadership is clear and increasingly urgent, revealing a gap between principled support and practical action.





Section 1: Economic Pressures Shape Environmental Attitudes and Limits to Action

GlobeScan's global research reveals that economic pressures are a defining influence on public attitudes toward climate and nature agendas. While people broadly support environmental investment and see the importance of a healthy environment to economic growth, the rising cost of living is creating a barrier to personal sacrifice.

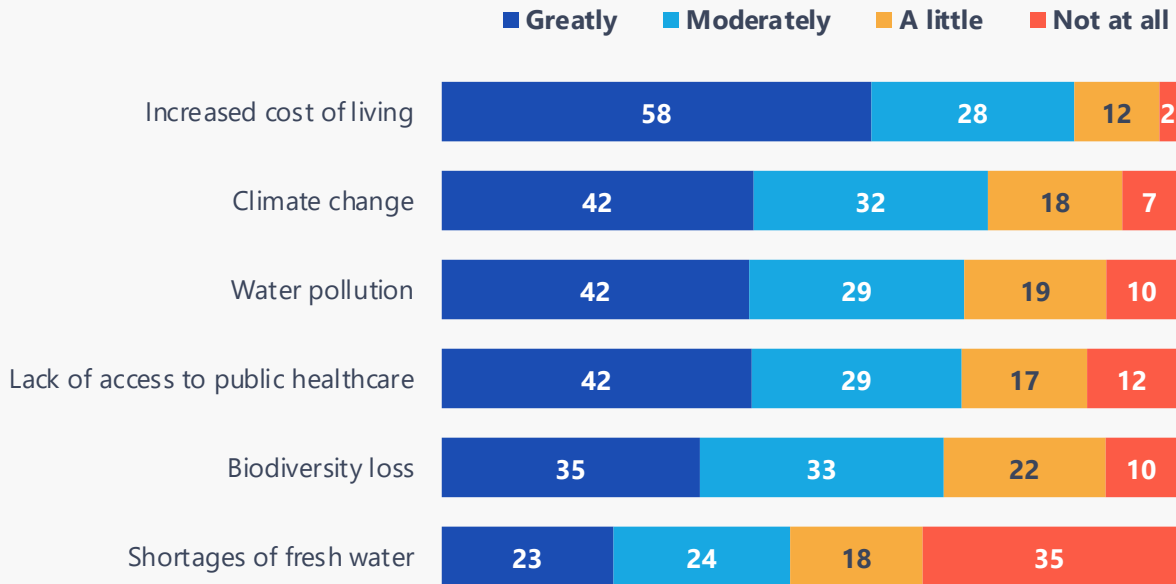
The tension between environmental aspiration and financial constraint is consistent across markets, with affordability emerging as a key filter through which the viability of sustainability is assessed. This insight highlights the need for policy and messaging that aligns environmental progress with economic well-being, especially in a time of growing economic insecurity.

Although Environmental Issues Are of Notable Concern, the Cost of Living Is the Most Personal Pressure Point

Among all global issues, the increased cost of living is the most personally felt challenge of all the issues presented. However, environmental concerns such as climate change, water pollution, and biodiversity loss also rank prominently. This dual pressure highlights the complexity of public sentiment: people are deeply affected by both economic and environmental factors, which shape their willingness and capacity to support sustainability efforts.

Extent Personally Affected by Issues

Average of 33 Markets, 2025



Q: How much are you personally affected by each of the following?



ECONOMIC PRESSURES SHAPE ENVIRONMENTAL ATTITUDES AND LIMITS TO ACTION

Countries vary significantly in terms of how much people feel they have been personally affected by climate change compared to the rising cost of living. In Australia and the Netherlands, the cost of living is rated 29 percentage points higher than climate change, followed closely by the UK (28 points) and Germany (27 points). At the other end of the spectrum, Mexico is the only market where more people feel personally affected by climate change than by cost of living (by 1 percentage point). People in India, Vietnam, and Colombia show near parity, with cost of living rated just 1 percentage point higher than climate change.

Even when people care deeply about the environment, financial pressure can limit their ability to act, making cost a significant barrier to personal engagement.

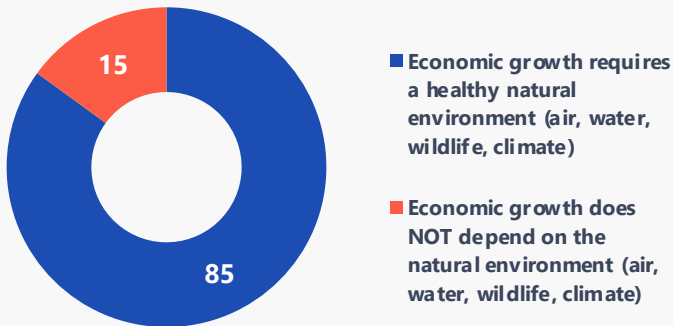


Environmental Protection Is Widely Supported and Seen as Key to Economic Growth

Public support for environmental protection is not only strong, it is deeply tied to how people view economic progress. A large majority believes that a healthy natural environment, including clean air, water, wildlife, and climate, is essential for economic growth. This belief is echoed in the widespread support for national efforts to become more environmentally friendly through efficient resource use, lower emissions, and nature preservation. Together, these views suggest that people see sustainability and prosperity not as competing goals, but as priorities that go hand in hand.

Economic Growth vs Natural Environment

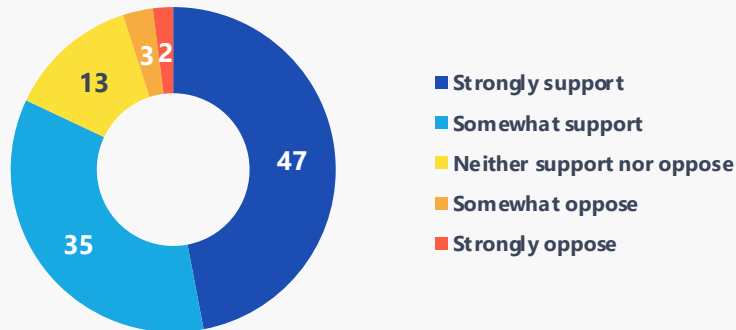
Average of 33 Markets, 2025



Q: Which of the following opinions is closest to your own?

Support for an Environmentally Friendly Country

Average of 33 Markets, 2025



Q: Creating a more environmentally friendly country would mean more efficient use of natural resources, lower carbon emissions, and preserving nature. This would require changes in government policy, the way companies operate, and individual lifestyles. Do you support or oppose this transition?



A Balance Must Be Reached between Environmental Protection and Economic Growth

While people broadly recognize the importance of a healthy environment for economic growth, their views on how to balance these priorities are more nuanced. Half of the global public believes that environmental protection and economic growth should be given equal priority. However, in nearly every market surveyed, the next most common view is that the environment should be prioritized, even if it means slowing economic growth. Globally, nearly three times as many people say the environment should take precedence over the economy than those who believe the economy should supersede environmental protection. These findings suggest that while economic concerns remain central, there is a strong underlying desire to see sustainability elevated as a national priority.

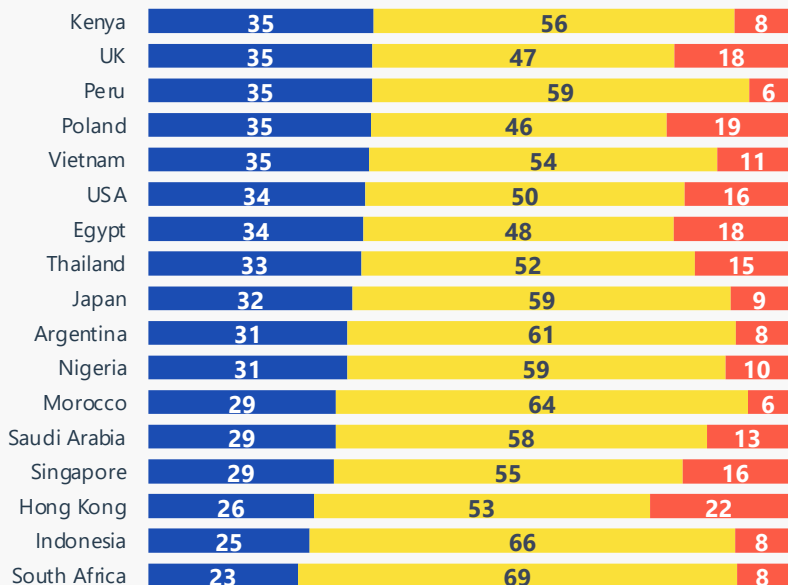
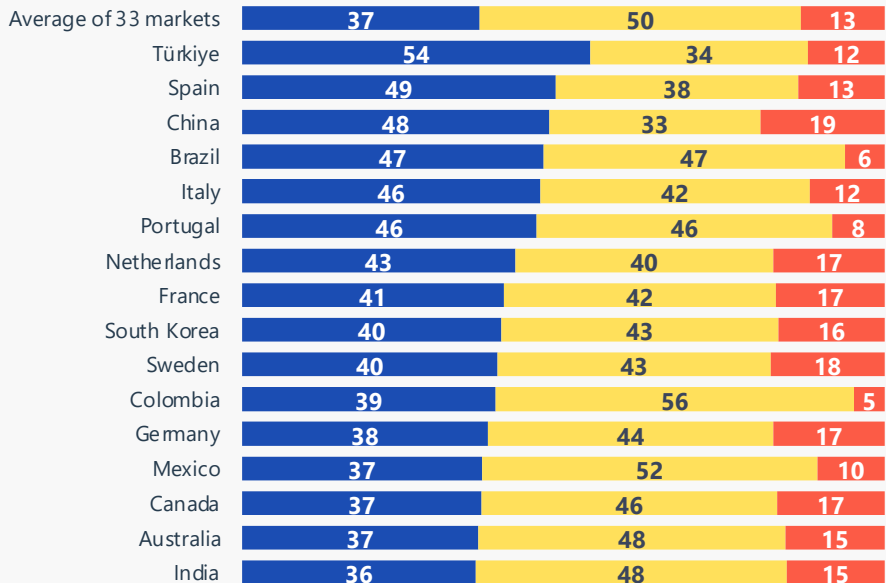
Economic Growth vs Environmental Protection

Average of 33 Markets and by Market, 2025

■ Protecting the environment should be given priority, even at the risk of slowing down economic growth

■ Both should be given equal priority

■ Economic growth should be given priority, even if the environment suffers to some extent



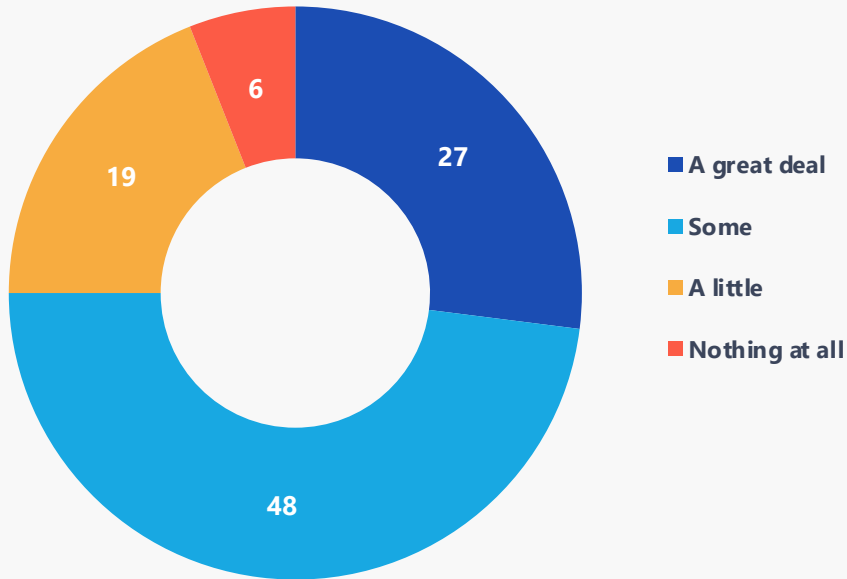
Q: With which of these statements about the environment and the economy do you most agree?

Willingness to Sacrifice Varies, but Global Commitment Is Strong

Globally, only 27 percent of people say they are willing to sacrifice “a great deal” to support the environmental transition (although another 48% indicate they are willing to make “some” sacrifice). The proportion of people willing to sacrifice a great deal drops to 10 percent in several industrialized markets, including Germany (9%), Hong Kong (8%), South Korea (7%), and Japan (3%). In contrast, markets typically classified as being part of the Global South show significantly higher willingness for personal sacrifice (55% in Kenya, 47% in India, 46% in Egypt, 45% in Türkiye, and 43% in Nigeria).

Willingness to Sacrifice for Transition

Average of 33 Markets, 2025



Q: As you may know, it is possible that the transition to an environmentally friendly country may have some negative impacts on your quality of life in the short term. How much would you be willing to sacrifice to make this transition possible?

Support for Environmental Goals Is High, but Willingness to Sacrifice, Especially Financially, Falls Short

While most people say they support the transition to a more environmentally friendly country, fewer are willing to make personal sacrifices needed to help make it happen. Among those who express willingness to make changes, people are most willing to make lifestyle changes such as recycling or avoiding plastic, reducing energy use, and supporting environmentally committed politicians, but are much less willing to make personal sacrifices like minimizing their living space or paying higher taxes.

Willingness to Make Changes for an Environmentally Friendly Country

"Yes," Average of 33 Markets, 2025



Q: Would you be willing to do any of the following changes to make the shift to an environmentally friendly country possible?



Section 2: The Global South Leads in Concern and Commitment to Change

The *Societal Shift* project highlights a clear regional divide in public engagement with the agendas of climate and nature vs economy. Countries in the Global South, particularly those where people's activities and livelihoods are more closely tied to natural resources, express greater concern about climate change, stronger support for the transition to a green economy, and indicate higher levels of personal impact from climate change and the loss of nature. These populations also indicate a higher willingness to make personal sacrifices to enable environmental progress. In contrast, many industrialized nations show lower levels of concern and engagement, often constrained by climate fatigue and economic comfort. These findings underscore the need for regionally tailored strategies that reflect differing levels of urgency, optimism, and readiness to act.

The Global South Leads in Perceived Severity of Climate Change

Concern about the seriousness of climate change has declined between 2024 and 2025 in every market surveyed except Japan and France. Markets in Latin America and Africa consistently rank climate change higher as a “very serious” issue. This contrasts with lower concern in industrialized nations such as China, the Netherlands, Hong Kong, and Australia, highlighting the regional divide in urgency and perception of the threat posed by climate change.

Climate concern in Mexico (80%) is significantly higher than in China (32%) and the Netherlands (33%), highlighting the regional divide in perceived climate threat.

Full regional findings below

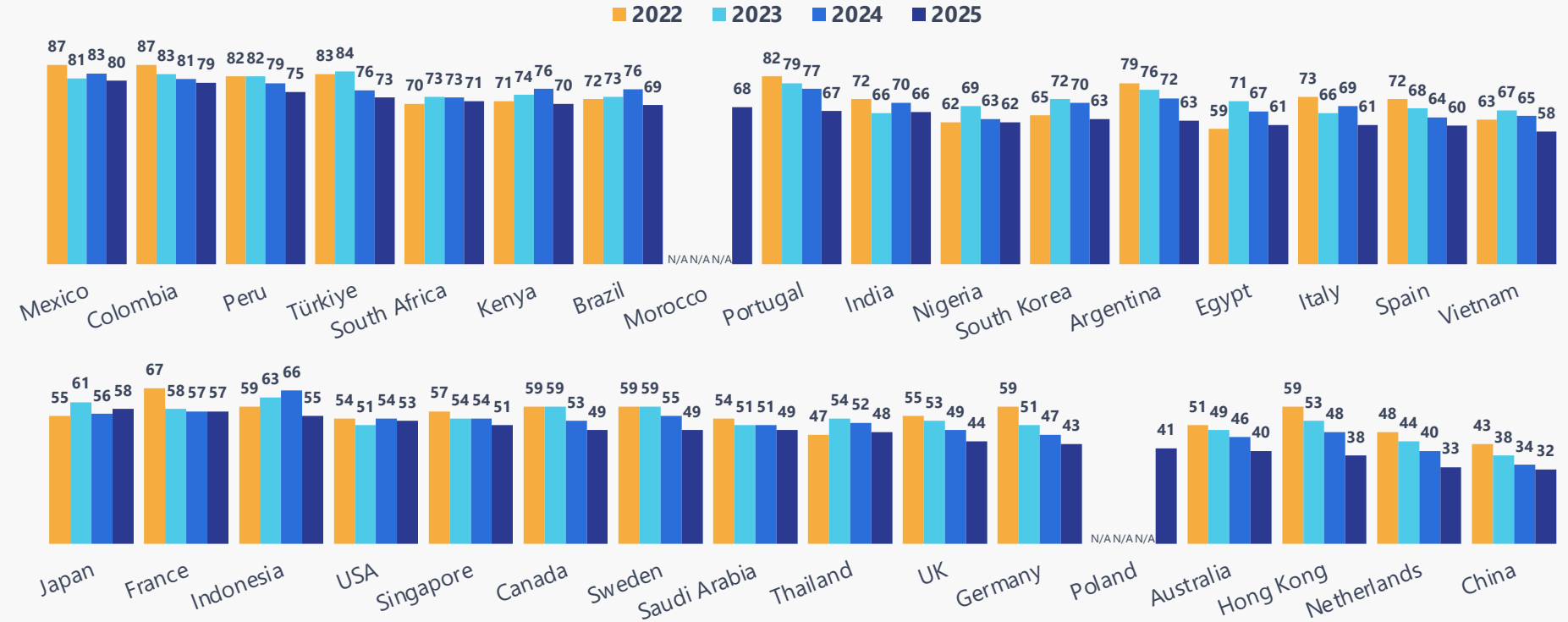


THE GLOBAL SOUTH LEADS IN CONCERN AND COMMITMENT TO CHANGE



Perceived Seriousness of Climate Change

"Very Serious," by Market, 2022–2025



Q: For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem – Climate change or global warming



THE GLOBAL SOUTH LEADS IN CONCERN AND COMMITMENT TO CHANGE

The World Has Reached Near-universal Agreement on the Need for a Green Energy Transition

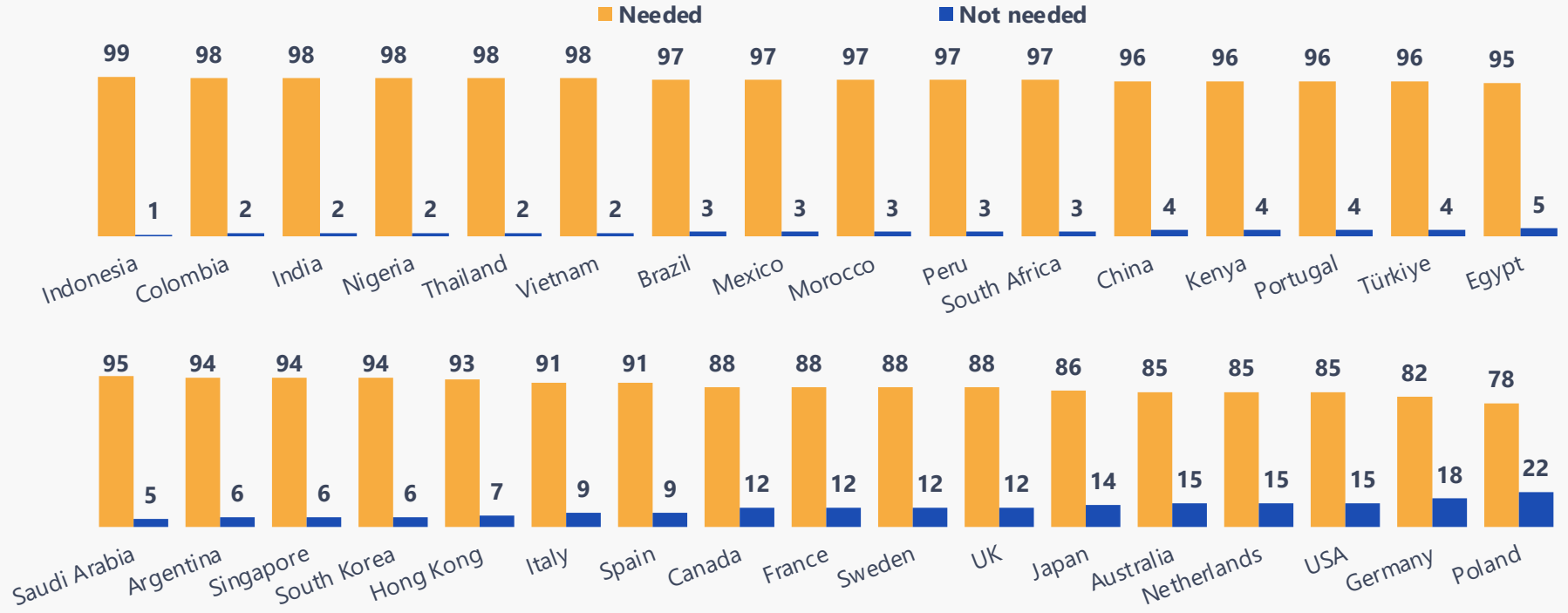
Public opinion around the globe strongly favors a shift to renewable energy, with near-universal support in markets such as Indonesia, Colombia, India, Nigeria, Thailand, and Vietnam where 98 percent of respondents believe the transition to a green economy is needed. This overwhelming consensus in the Global South underscores both the urgency and personal relevance of climate action in these regions. In contrast, support is lower in Australia, the Netherlands, the USA, Germany, and Poland, although a large majority in these markets still supports the green transition.



73% of people believe that transitioning away from fossil-based energy would have a positive impact on their lives and their families.

Receptiveness to Shifting to a Green Economy

"Very Much" and "Somewhat Needed" vs "Not Very Much" and "Not at All Needed," by Market, 2025



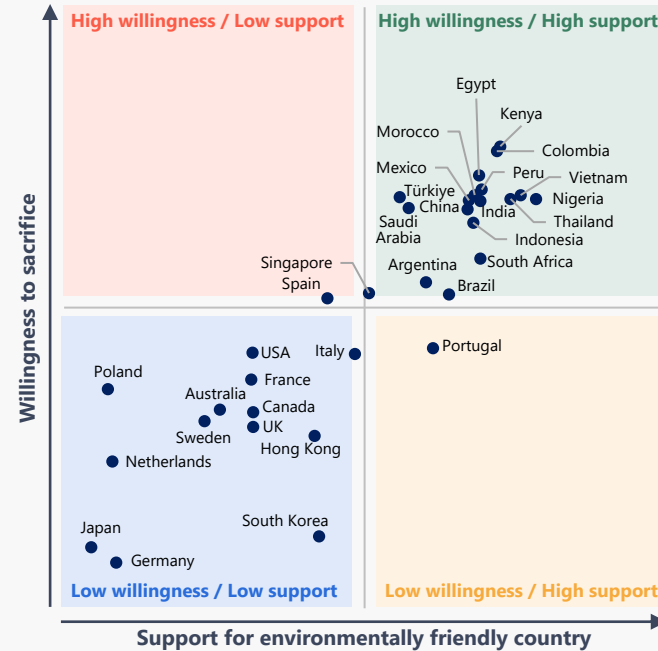
Q: In the last few years, some societies have begun shifting from fossil-based energy (e.g., oil, gas, coal) to renewable sources of energy (e.g., wind, water, solar) to address climate change. This is often called the transition to the green economy. How much would you say the shift to the green economy is needed?

There Is Strong Correlation between Markets Supporting a More Environmentally Friendly Development Model and Claiming Willingness to Sacrifice to Make the Transition Possible

Designed to explore the intersection of values and action, the matrix compares how strongly people support a greener future and how much they are willing to sacrifice to achieve it. Markets in the upper right quadrant have higher support for the transition and a higher willingness to sacrifice. When comparing support for an environmentally friendly country with willingness to make sacrifices, the Global South dominates the quadrant of high support and high willingness. This contrast with the Global North underscores the need for differentiated strategies that reflect regional realities.

Support for an Environmentally Friendly Country vs Willingness to Sacrifice

By Market, 2025



Q: Creating a more environmentally friendly country would mean more efficient use of natural resources, lower carbon emissions, and preserving nature. This would require changes in government policy, the way companies operate, and individual lifestyles. Do you support or oppose this transition? T106. As you may know, it is possible that the transition to an environmentally friendly country may have some negative impacts on your quality of life in the short term. How much would you be willing to sacrifice to make this transition possible?

The Societal Shift Index

To better understand global readiness for climate and nature-positive transitions, GlobeScan has developed the Societal Shift Index, a composite measure that captures public sentiment across five key dimensions:

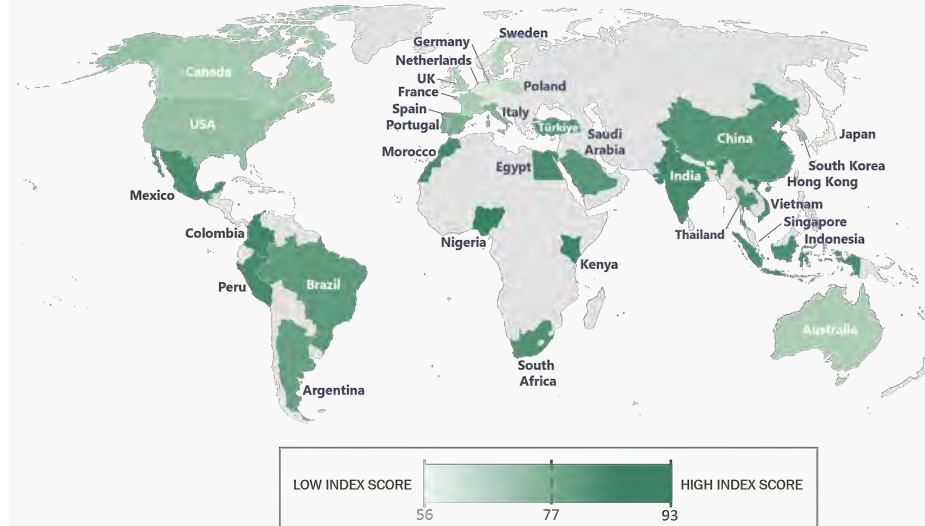
- Support for national investment in light of other priorities, such as the economy, defense, education, and healthcare
- The perceived need for a shift to a green energy
- Expected personal impact of the transition
- Support for national environmental progress
- Willingness to make personal sacrifices

Drawing on data from nearly 32,000 interviews across 33 markets, the Index highlights where societal momentum is strongest and where engagement gaps remain. It reflects not only levels of concern but also emotional commitment and perceived agency, offering a strategic lens for decision-makers ahead of COP30.

Each market's Index score is visualized in the map below, spotlighting those with the highest societal readiness to support environmental, economic, and social transformation. The markets with the highest Societal Shift Index scores are Nigeria, Kenya, Vietnam, and Colombia while the Netherlands, Germany, and Japan have the lowest Index scores.

Public Support for Environmental Action

By Market, 2025





Section 3: Emotional Responses to Environmental News Are Mixed but Actionable

The emotional landscape surrounding climate and environmental news is complex and deeply influential. While hope remains the most common response, fear, anxiety, and grief are also present. These emotions shape how people engage with sustainability efforts, with generational and geographic differences adding further nuance.

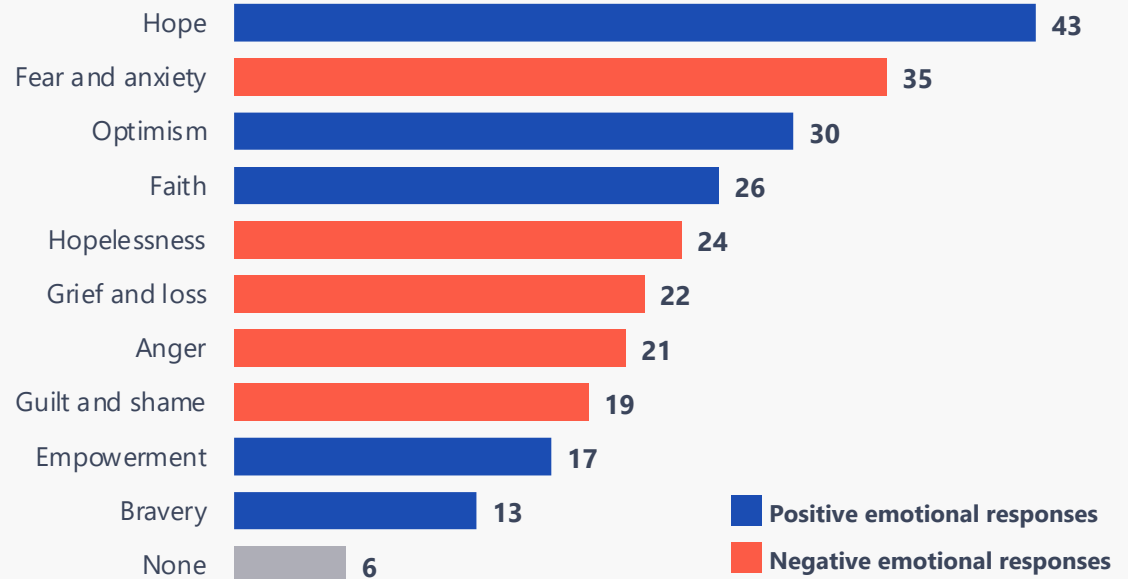
Our analysis shows that messages combining evidence-based impact, relevance to health, and simple, achievable actions resonate most. Amidst widespread uncertainty, communications that offer clarity, security, and personal relevance are key to unlocking public engagement.

Environmental News Evokes Hope, Anxiety, and Optimism

Globally, people report a wide range of emotions when exposed to environmental news. While hope is the most frequently mentioned emotion, fear and anxiety, grief, and anger are also common. This emotional complexity suggests that communications must be sensitive, regionally tailored, and emotionally resonant to drive engagement.

Emotional Responses to Environmental News

Total Mentions, Average of 33 Markets, 2025



Q: Please select up to three emotions that you most strongly feel when you read, hear, or see something about the environment (e.g., air, water, nature, climate, etc.).

Emotional Reactions Vary Widely across Regions, from Mostly Positive in Africa to Predominantly Negative in Europe

Different regions have distinct emotional profiles in response to environmental issues. For example, Africa and the Middle East shows more hope and empowerment, while people in Europe and North America lean toward fear, anxiety, and hopelessness. These differences underscore the importance of culturally grounded messaging strategies to ensure environmental messages account for differing perspectives and outlooks.

Emotional Responses to Environmental News

Top Emotions, by Region, 2025

	Africa / Middle East	Asia-Pacific	Europe	Latin America	North America
1	Hope	Hope	Fear/anxiety	Hope	Hope
2	Optimism	Fear/anxiety	Hope	Optimism	Fear/anxiety
3	Fear/anxiety	Optimism	Hopelessness	Faith	Optimism
4	Faith	Faith	Anger	Fear/anxiety	Hopelessness
5	Empowerment	Grief/loss	Grief/loss	Hopelessness	Anger

Q: Please select up to three emotions that you most strongly feel when you read, hear, or see something about the environment (e.g., air, water, nature, climate, etc.).

Evidence-based, Simple Messaging Appeals to the Majority

Our analysis shows that messages that highlight how people's choices can impact the environment in a positive way have the widest appeal among the global audience as well as in many markets. When empowering messages are paired with incentives like discounts or public recognition, the reach of these messages grows even more. Messaging that makes taking action seem easy and achievable, that is backed up by credible facts, and that highlights long-term savings that come with making environmentally friendly choices also helps reach a wider audience. Combining these approaches ensures that at least some messages will appeal to most people, creating a strong foundation for campaigns and policies.

Optimal Messaging Combination to Inspire Sustainable Behavior

TURF Analysis, Cumulative Reach per Message Combination,* Average of 33 Markets, 2025

Single best message (33%)	Best two-message combination (54%)	Best three-message combination (68%)	Best four-message combination (77%)	Best five-message combination (82%)
The positive impact my choices can have on the environment	The positive impact my choices can have on the environment	The positive impact my choices can have on the environment	The positive impact my choices can have on the environment	The positive impact my choices can have on the environment
	Offer rewards, discounts, or recognition	Offer rewards, discounts, or recognition	Offer rewards, discounts, or recognition	Offer rewards, discounts, or recognition
		Make choices feel simple and achievable	Make choices feel simple and achievable	Make choices feel simple and achievable
			Clear, evidence-based facts and data	Clear, evidence-based facts and data
				Affordability or long-term cost savings

*Cumulative reach refers to the percentage of respondents who picked at least one of the claims in the combination as most inspiring.

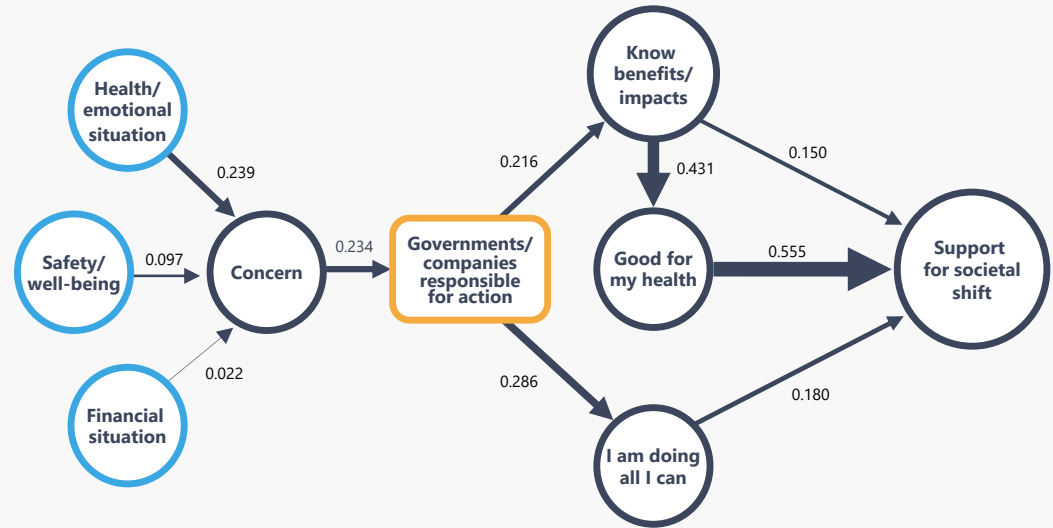
Q: Please select up to three emotions that you most strongly feel when you read, hear, or see something about the environment (e.g., air, water, nature, climate, etc.)

Governments and Companies Can Leverage Health as a Driver for Societal Shift

Public concern about environmental issues is often emotionally driven, with health emerging as a particularly powerful motivator. When people feel concerned, especially about health, they are more likely to expect action from governments and companies rather than seeing themselves as the primary agents of change. This pattern leads to stronger support for the societal shift to a greener economy. The dynamic highlights the importance of institutional leadership and messaging that connects environmental progress to tangible health benefits. By framing sustainability as a pathway to improved well-being, leaders can tap into public sentiment and help catalyze broader societal engagement.

Pathways to Support for Societal Shift

Average of 33 Markets, 2025





Section 4: Public Expectations for Leadership Are High, but Progress Is Limited

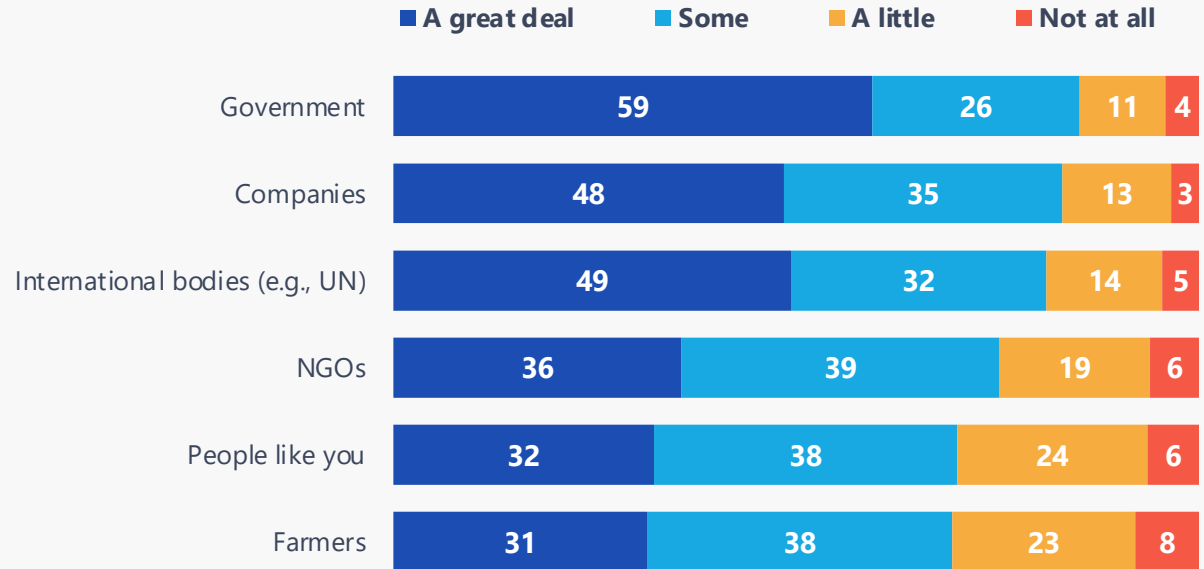
Across markets, people overwhelmingly expect governments, companies, and international institutions to lead the response to climate change. However, most feel their countries have made only modest progress toward becoming environmentally friendly. There is strong support for systemic solutions such as regulation, innovation, and international collaboration, but a gap persists between public expectations and perceived action. As COP30 approaches, there is a demand for bold, coordinated leadership, and these findings suggest that credibility and ambition will be critical for institutions seeking to maintain public trust and momentum.

Governments, Companies, and International Bodies Are Expected to Lead on Climate Action

Public opinion places the greatest responsibility for addressing climate change on governments, followed by international bodies and companies, while individuals and NGOs are seen as less responsible. This reflects a strong expectation of systemic leadership rather than individual action.

Perceived Responsibility of Institutions to Address Climate Change

Average of 33 Markets, 2025



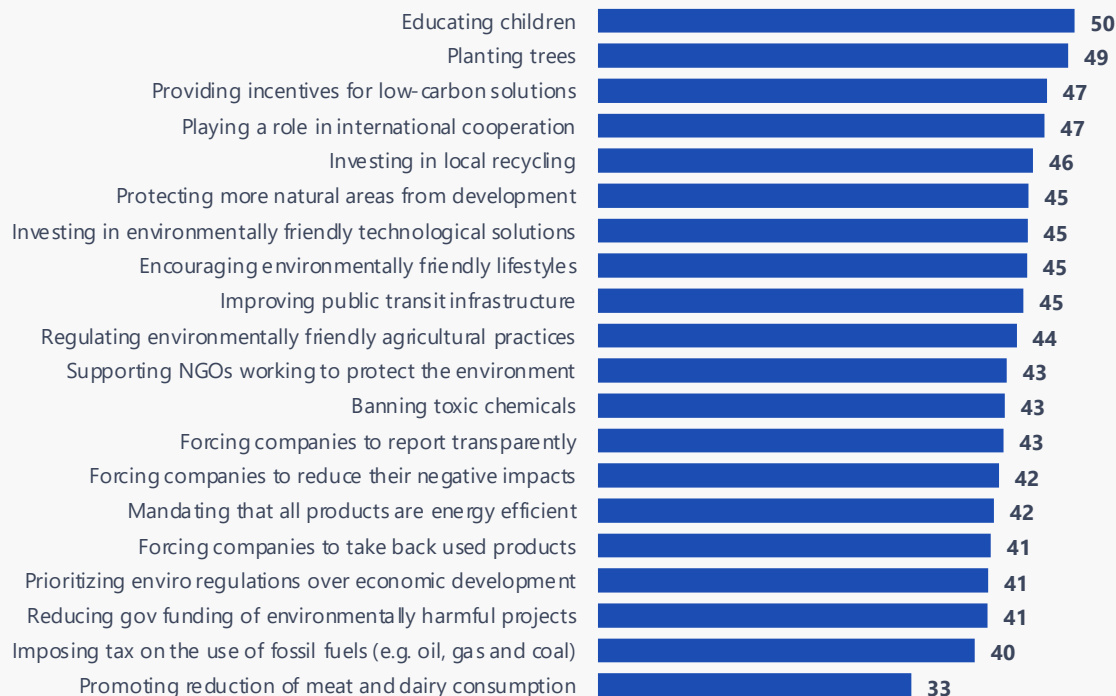
Q: How much do you hold each of the following responsible to address climate change?

Most People See Only Limited Progress on Environmental Policies

Across the 33 markets surveyed, respondents report only modest progress in areas like regulating agriculture, investing in green tech, and protecting nature. In areas where progress is seen to be strongest, such as educating children or planting trees, only half say that it is progressing well. The perceived lack of action reinforces the public's call for stronger environmental leadership and accountability.

Perceived Country Progress on Environmentally Friendly Shift

"Very Significant Progress" and "Good Progress," Average of 33 Markets, 2025



Q: Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.

Perceptions of Progress Define What Environmental Actions Matter Most

The global priority matrix reveals how the public evaluates environmental initiatives based on two dimensions: overall national progress toward becoming environmentally friendly, and progress in specific areas of environmental action. Actions that are perceived as both impactful and aligned with broader national progress, such as international cooperation, prioritizing environmental regulations over economic growth, and investing in technological solutions, are viewed as having the greatest potential to meet people's aspirations for a greener future.

Explore environmental
action priorities by region.

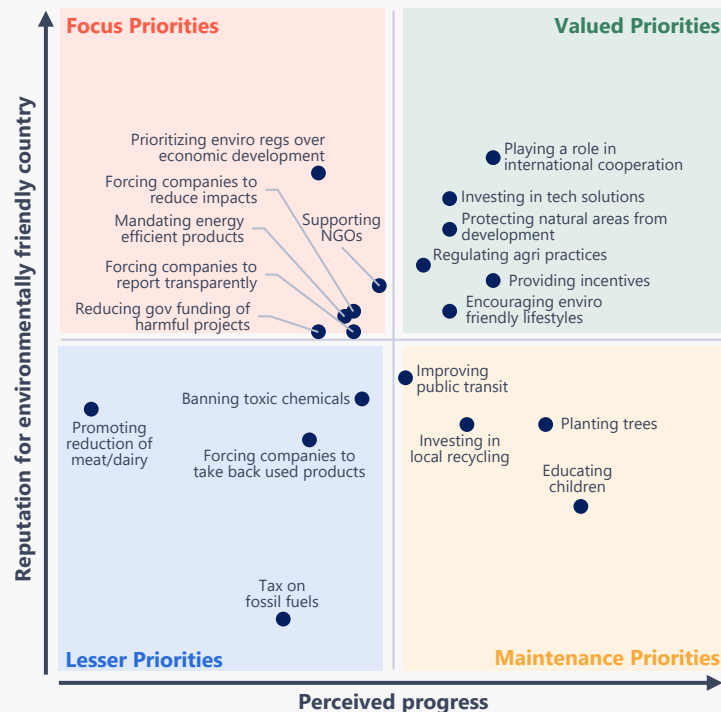
See report appendix



PUBLIC EXPECTATIONS FOR LEADERSHIP ARE HIGH, BUT PROGRESS IS LIMITED

Reputation for Environmentally Friendly Country vs Perceived Progress

All Respondents, 2025



Q: How would you rate [COUNTRY's] progress in becoming a very environmentally friendly country?
Q: Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.



PUBLIC EXPECTATIONS FOR LEADERSHIP ARE HIGH, BUT PROGRESS IS LIMITED

People Want Their Countries to Lead at COP30

Globally, half of respondents say they want their country to play a leadership role in setting ambitious climate targets at COP30. Latin American markets, including Brazil, are among those with the highest support, while more moderate or skeptical views are found in parts of Europe and East Asia. With Brazil hosting COP30, this strong regional support underscores the opportunity for the summit to deliver a bold and ambitious outcome.

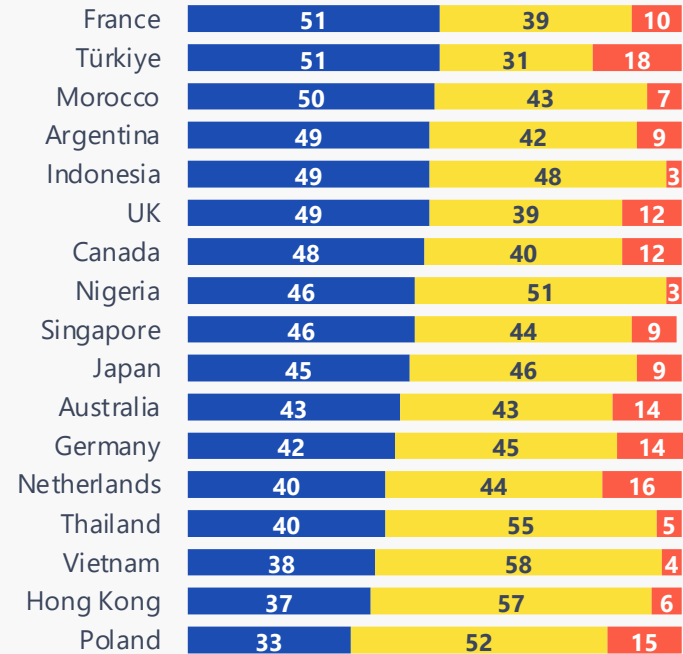
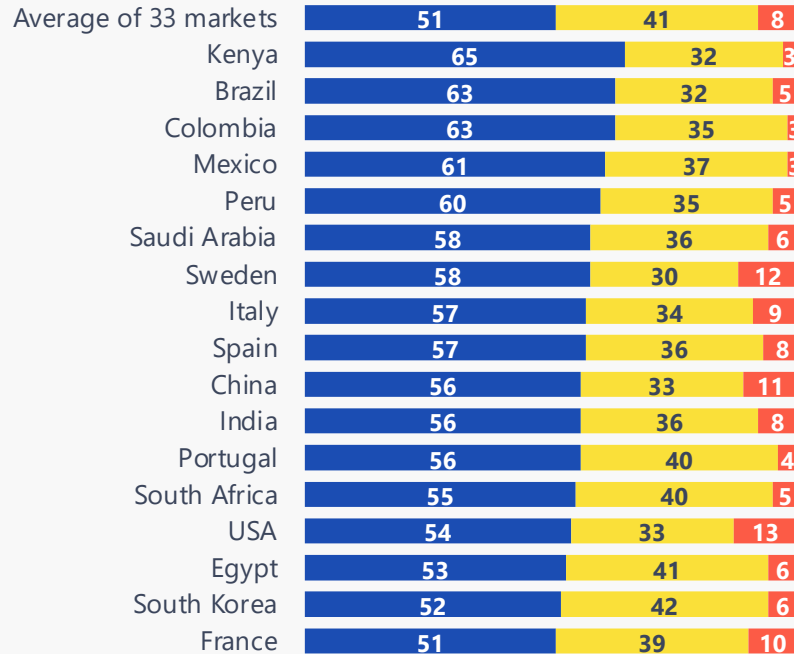


63% of Brazilians want their country to lead on ambitious climate targets at COP30.

Preferred Market Strategy for COP30

Average of 33 Markets and by Market, 2025

■ Play a leadership role in setting ambitious targets to address climate change as quickly as possible
 ■ Take a more moderate approach and support only gradual action to address climate change
 ■ Do not agree to any international agreement that addresses climate change



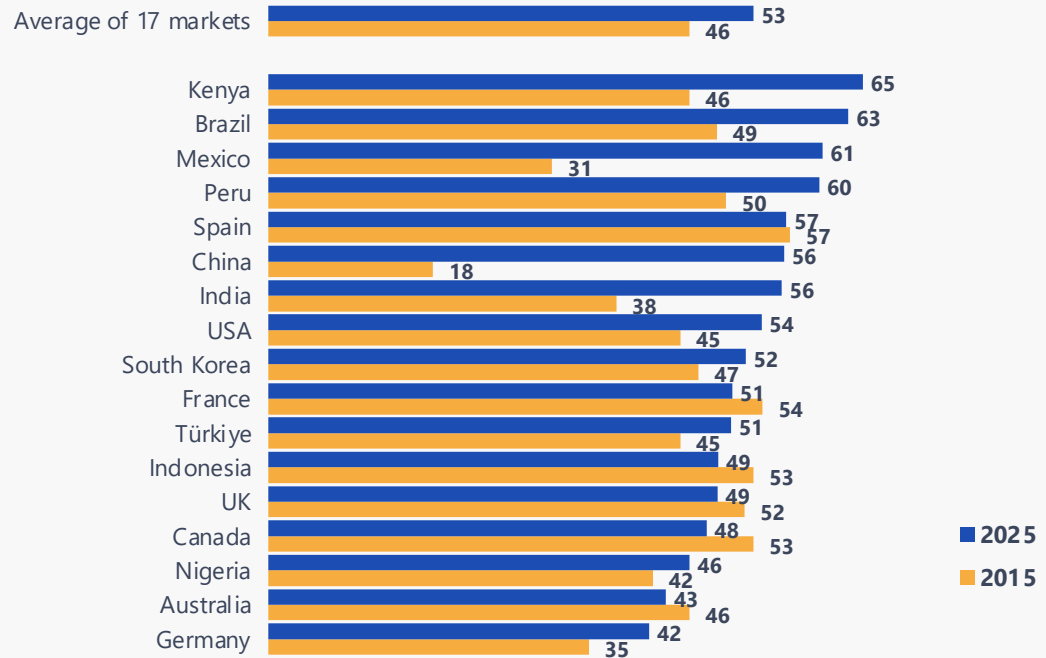
Q: In November 2025, countries from around the world, including [COUNTRY], will be meeting to discuss how they can work together to reduce emissions of gases that cause climate change or global warming. Which of the following do you think should be [COUNTRY'S] strategy at this meeting?

Support for Climate Action Has Grown Since COP21

Public support for bold climate leadership has grown since COP21. In 2015, 46 percent of people across 17 markets wanted their governments to lead on ambitious climate targets. By 2025, that figure has risen to 53 percent, with major increases in markets like China, Mexico, Kenya, India, and Brazil. This rising global ambition sets the stage for COP30 to deliver a transformative outcome.

Preferred Country Strategy for COP30 – Play a Leadership Role in Setting Ambitious Targets to Address Climate Change as Quickly as Possible

Average of 17 Markets and by Market, 2015–2025



Q: In November 2025, countries from around the world, including [COUNTRY], will be meeting to discuss how they can work together to reduce emissions of gases that cause climate change or global warming.

What's Next

The global public clearly supports a future grounded in well-being, one that integrates a healthy economy, healthy people, and a healthy environment. Across regions, there is a shared understanding that systemic change is essential to achieve this transformation. People expect governments and businesses to lead the way by accelerating the shift to renewable energy, enforcing effective environmental regulations, and establishing global governance frameworks that enable a new economy to thrive. Visible leadership from institutions is key to mobilizing individuals who are eager to contribute and to creating collective momentum for change across society.

PUBLIC EXPECTATIONS FOR LEADERSHIP ARE HIGH, BUT PROGRESS IS LIMITED





Expert Perspectives: Key Findings

Building on the scope and the analysis of this global survey, GlobeScan also convened expert roundtables to explore the dimensions of societal transformation. These discussions revealed critical insights into how narratives, emotions, and systemic leadership shape public engagement. The following summary distills five key findings from these dialogues, offering a qualitative lens through which to interpret the survey findings and the Societal Shift Index.

**Narratives must be plural,
not singular**

No single message or strategy drives change universally. Instead, transformation requires multiple levers (regulation, emotional resonance, public awareness) rooted in local and cultural contexts. Narratives should reflect diverse value systems rather than impose dominant ones.

**Emotions are central,
yet underserved**

Societal transitions are emotionally charged, involving grief, loss, hope, and anxiety, and societies lack the rituals, language, and support structures to process these experiences. While hope is prevalent, empowerment and agency are low, suggesting a need for emotional scaffolding to bridge optimism with action.

**Climate fatigue is real
and growing**

There is a decline in concern for environmental issues, especially in the Global North, due to fatigue, hyper-normalization, and the complexity and scale of the climate crisis. People struggle to connect abstract concepts like biodiversity loss to their daily lives. Simpler, more relatable framing, like “healthy people, healthy environment,” is more effective.



Storytelling beats statistics

Facts alone do not move people. Positive narratives that connect sustainability to personal health, community well-being, and tangible benefits resonate more deeply. Emotional and cultural relevance is key to motivating behavior.



Creating an inevitability feedback loop

When sustainability is seen as inevitable, it can inspire hope and guide practical actions. Experts stress, however, that positive inevitability must be coupled with a sense of agency, helping individuals feel that they can play a part in shaping it. Ensuring a virtuous feedback loop of a changing society – how we eat, how we work, how we move, how we shop, etc. – is fundamental to gaining a critical mass of society not only believing in a sustainable future but proactively participating in it. This will require consistent and reinforcing signals from governments, brands, and civil society organizations on the inevitability of a sustainable future.



Strategic Recommendations from Public Voices and Expert Input

To unlock greater public support for climate and nature-positive transitions, leaders must respond to emotional realities, economic pressures, and cultural diversity with empathy and strategic clarity. Based on GlobeScan's global research and expert roundtables, we recommend the following.

1. Ground Strategies in Cultural and Emotional Realities

- **Design layered, locally relevant approaches** that reflect diverse value systems and lived experiences.
- **Create trusted spaces** for inclusive engagement, avoiding dominant narratives that alienate or oversimplify.
- **Support emotional processing** through storytelling, rituals, and community-based engagement to address grief, loss, and climate fatigue.

2. Reframe Sustainability around Evidence-based Benefits, Inevitability, and Sense of Agency

- **Use emotionally resonant messaging** that connects environmental action to personal health, affordability, and daily life.
- **Avoid abstract appeals;** instead, offer clear, evidence-based solutions that feel achievable and reduce complexity.
- **Prioritize message combinations** that reach the broadest audience (e.g., health + affordability + simplicity).
- **Pair narratives of positive inevitability with a sense of agency,** helping people feel they can shape the future, and not just observe it.





3.

Address Climate Fatigue with Tangible, Empowering Narratives

- **Recognize declining concern and emotional fragmentation**, especially in wealthier markets.
- **Shift from crisis framing to opportunity framing**, emphasizing empowerment, community resilience, and co-benefits.
- **Segment communications by geography and generation** to reflect emotional diversity and engagement styles.

4.

Align Environmental Progress with Health and Economic Well-being

- **Frame sustainability as a driver of economic resilience**, not as a threat to prosperity.
- **Design policies that deliver multiple benefits** – environmental conservation, better health and well-being, and cost-of-living relief.
- **Avoid asking for personal financial sacrifice without systemic support**; instead, focus on institutional responsibility and incentives.

5.

Tailor Engagement to Regional Readiness and Optimism

- **In the Global South**, amplify urgency and support for bold action, leveraging optimism and willingness to sacrifice.
- **In the Global North**, address cynicism and loss aversion with pragmatic, empowering strategies.
- **Use regional data** to inform differentiated policy and communication approaches.

6.

Demonstrate Systemic Leadership and Progress

- **Respond to public expectations for bold, coordinated action** from governments, companies, and international bodies.
- **Invest in high-impact, large-scale initiatives:** regulation, innovation, nature protection, and agricultural reform.
- **Signal ambition at COP30** with clear national commitments and leadership positioning.

RECOMMENDATIONS





Appendix

Regional Environmental Action Priorities

We explore how perceptions of progress and importance vary by market, revealing distinct national profiles of engagement, readiness, and priority across the environmental agenda.

-  **Valued Priorities** – Initiatives that score high on both importance and progress, reflecting strong public endorsement and perceived effectiveness.
-  **Focus Priorities** – Initiatives that are seen as highly important but where perceived progress is low. These represent areas where public expectations are high, but delivery is lagging.
-  **Maintenance Priorities** – Initiatives with high perceived progress but lower importance, often seen as well-established or less urgent.
-  **Lesser Priorities** – Initiatives that are rated low on both dimensions, suggesting limited public attention or relevance.

This framework helps identify where momentum is strong, where gaps exist, and where strategic focus is most needed.

Public perceptions of environmental initiatives vary significantly across regions, revealing distinct priorities and engagement styles which underscore the need for tailored strategies that reflect local values, emotional engagement, and lived experience.

In Africa and the Middle East, infrastructure and lifestyle initiatives receive stronger support, reflecting a desire for development-aligned sustainability and tangible daily improvements. International cooperation is also seen as highly important, suggesting optimism and readiness for collective action.

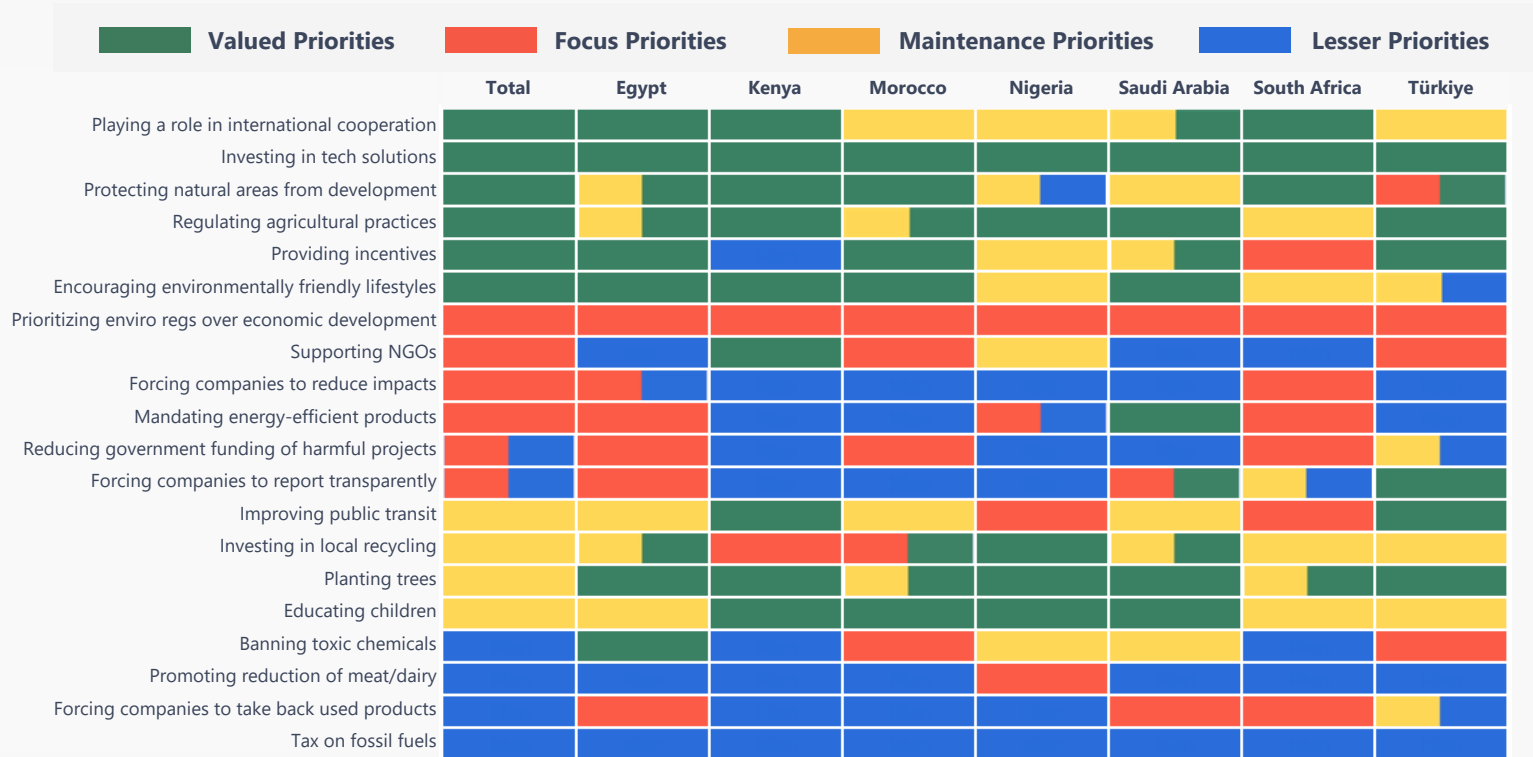
In Europe and North America, regulatory and corporate accountability initiatives are considered important, but perceived progress is low, indicating strong demand for systemic change, but limited confidence in delivery.

APAC markets show strong perceived progress and importance for infrastructure and international cooperation initiatives. Corporate accountability is a focus priority – seen as important but underdelivered – highlighting a gap between public expectations and perceived action.

Latin America shows strong support for international cooperation and incentives, with lifestyle initiatives also ranking high in importance.

Reputation for Environmentally Friendly Country vs Perceived Progress

Africa / Middle East, 2025

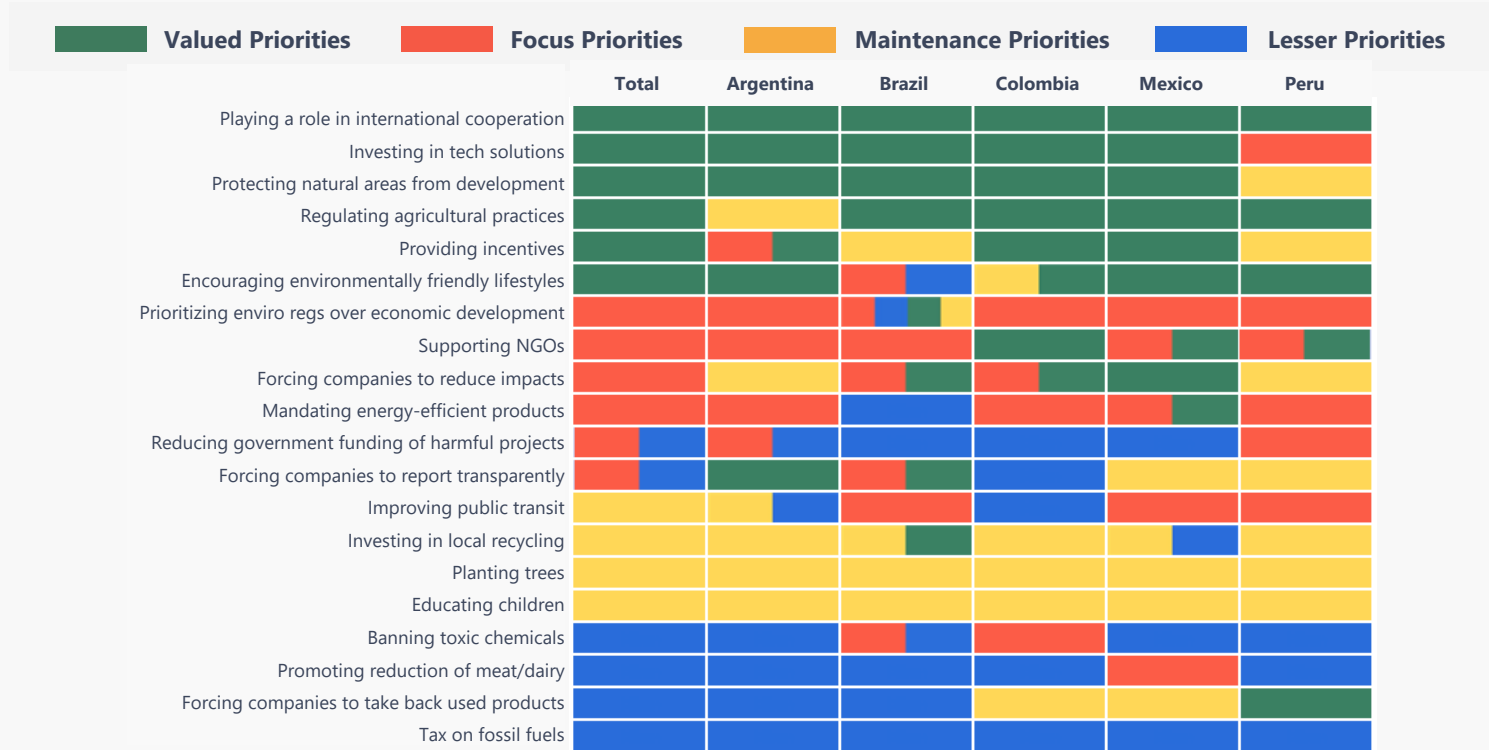


Q: How would you rate [COUNTRY'S] progress in becoming a very environmentally friendly country?

Q: Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.

Reputation for Environmentally Friendly Country vs Perceived Progress

Latin America, 2025

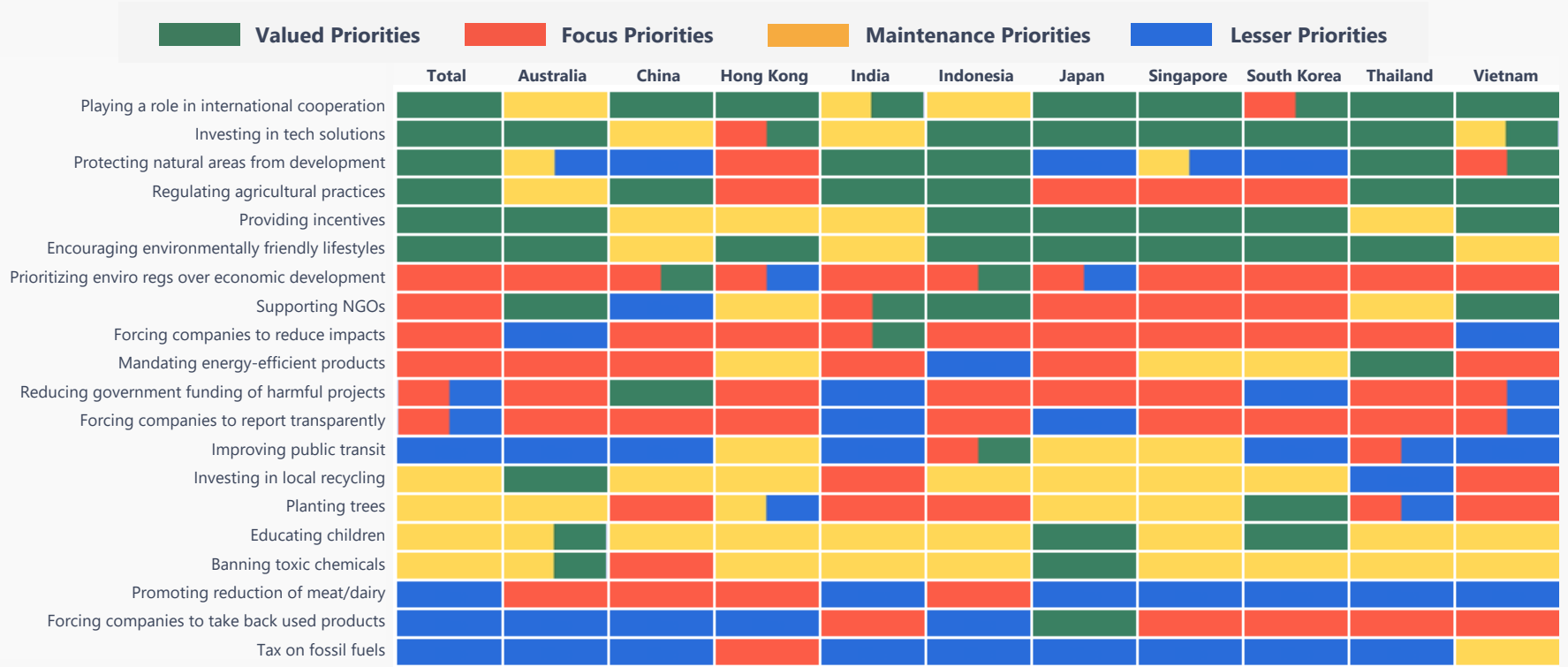


Q: How would you rate [COUNTRY'S] progress in becoming a very environmentally friendly country?

Q: Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.

Reputation for Environmentally Friendly Country vs Perceived Progress

Asia-Pacific, 2025

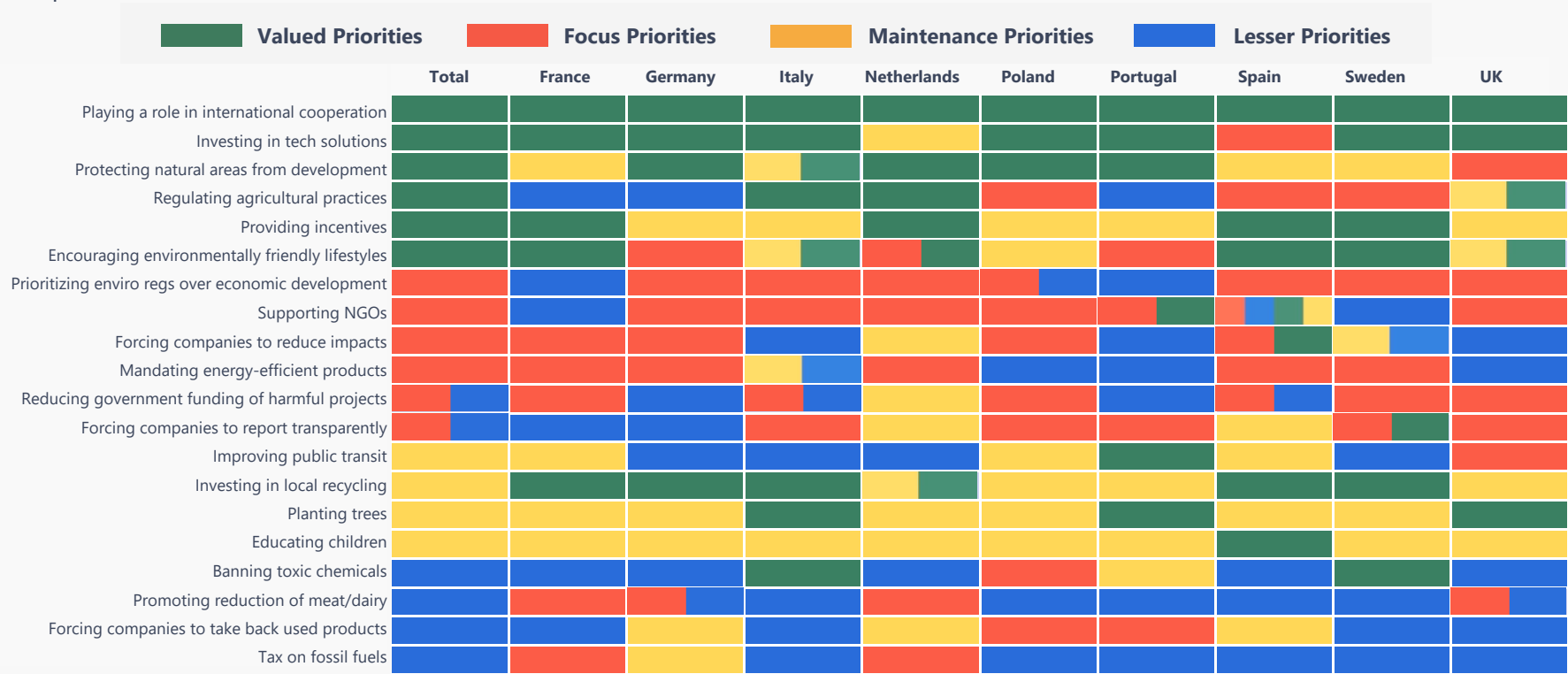


Q: How would you rate [COUNTRY'S] progress in becoming a very environmentally friendly country?

Q: Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.

Reputation for Environmentally Friendly Country vs Perceived Progress

Europe, 2025



Q: How would you rate [COUNTRY'S] progress in becoming a very environmentally friendly country?

Q: Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.

Reputation for Environmentally Friendly Country vs Perceived Progress

North America, 2025



Q: How would you rate [COUNTRY'S] progress in becoming a very environmentally friendly country?

Q: Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.

Methodology

The public opinion data presented in this report are based on 31,960 online surveys conducted across 33 markets, capturing public perceptions, societal trends, and attitudes toward climate and nature-related issues. Representative online samples were surveyed in each market, with approximately 1,000 respondents per market (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in the United States). Samples are representative of the online population in each market and weighted to align with national census demographics. Surveys were conducted in local languages where applicable to ensure cultural relevance and comprehension.

The online survey was conducted during July and August 2025.

In addition to the quantitative research, findings were discussed in roundtables with members of a Stakeholder Advisory Panel to gather expert feedback and explore the implications of the data. These roundtables were held in September and October 2025.

Participating Markets 2025



Stakeholder Advisory Panel

- **Alexis Morgan**, Global Water Stewardship Lead at WWF
- **Andrea Álvares**, Board Chair Instituto Ethos
- **Char Love**, Global Head of Advocacy, Natura
- **Charlotte Moore**, CEO, Sigwatch
- **Fleur Newman**, Unit Lead, UNFCCC
- **Guy Champniss**, Independent Consultant
- **Harvey Locke**, Conservationist and creator of “Nature Needs Half”
- **Helio Mattar**, Chairman, Akatu Institute
- **Joel Makower**, Co-founder of Trellis Group
- **Kavita Prakash-Mani**, Conservation and Sustainability Expert
- **Lorenzo Lotti**, Behavioural and Environmental Economist, University College London
- **Moritz Spielberger**, Referent Behavioural Change, WWF
- **Randi Kronthal-Sacco**, Senior Scholar NYU Stern Center for Sustainable Business
- **Raphael Bemporad**, Founding Partner, BBMG
- **The Rt. Hon. Joe Clark**, former Prime Minister of Canada



GlobeScan is an insights and advisory firm specializing in trust, sustainability, and engagement.

We equip clients with insights to navigate shifting societal and stakeholder expectations, crafting evidence-based strategies that reduce risks and create value for their organizations and society.

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The *Societal Shift* project was conducted as part of GlobeScan's Profit for Purpose Program, through which we commit 10% of our annual net income to initiatives that advance a more sustainable and equitable future. Our support is directed toward areas of greatest need or where we believe it can have the most meaningful impact.

**For additional information
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