

Societal Shift

A research project on
how to unlock greater public
support for a low-carbon,
nature-positive future

Webinar: 8 October 2025





**Know your world.
Lead the future.**

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.

Established in 1987, we have offices in Cape Town, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, and Toronto.

Introductions

Chris Coulter
CEO



London
Paris

Perrine Bouhana
Director, France



Hong Kong

Victoria Gilbert
Director, Asia-Pacific



Cape Town

Anneke Greyling
Director, Africa



Álvaro Almeida
Director, Brazil



Expert Roundtables: Key Findings



Expert roundtables reveal that effective societal transformation demands a multi-layered, emotionally resonant, and culturally grounded narrative

1. Narratives must be plural, not singular

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

2. Emotions are central, yet underserved

Societal transitions are emotionally charged, involving **grief, loss, hope, and anxiety**. Yet, 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.

3. 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 complexity**. People struggle to connect abstract concepts like biodiversity loss to their daily lives. Simpler, relatable frames, like “healthy people, healthy environment,” are more effective.

4. Systemic change is supported; personal sacrifice is not

Survey data show strong support for **systemic policies** (e.g., international cooperation, corporate regulation), but **low willingness for personal sacrifice**. People expect **governments and companies to lead**, revealing a gap between **principled support and practical action**.

5. Storytelling beats statistics

Facts alone do not move people. **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

Research Methodology

- Representative online samples of approximately 1,000 adults in each of 33 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in USA) ($n=31,996$).
- Samples are representative of online population, weighted to reflect general population census data.
- Fieldwork in July and August 2025.



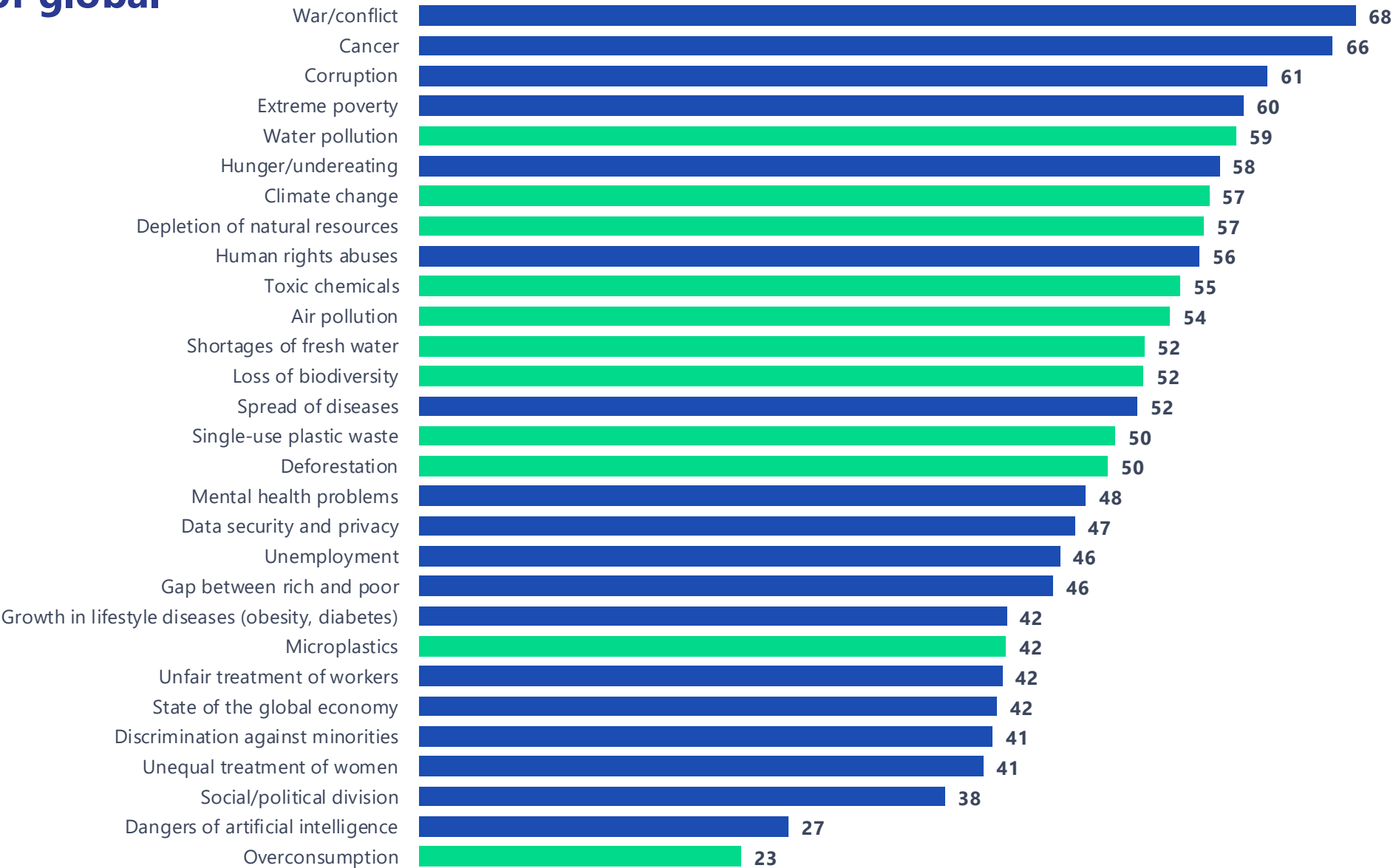
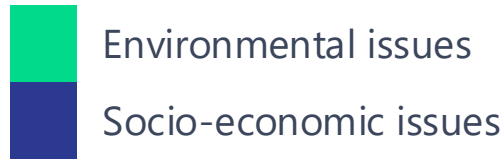
**1 Concern is dipping
but the environment
remains a core priority**



War, cancer, corruption and poverty top the list of global concerns

Perceived Seriousness of Global Problems

“Very Serious,” Average of 33 Markets, 2025

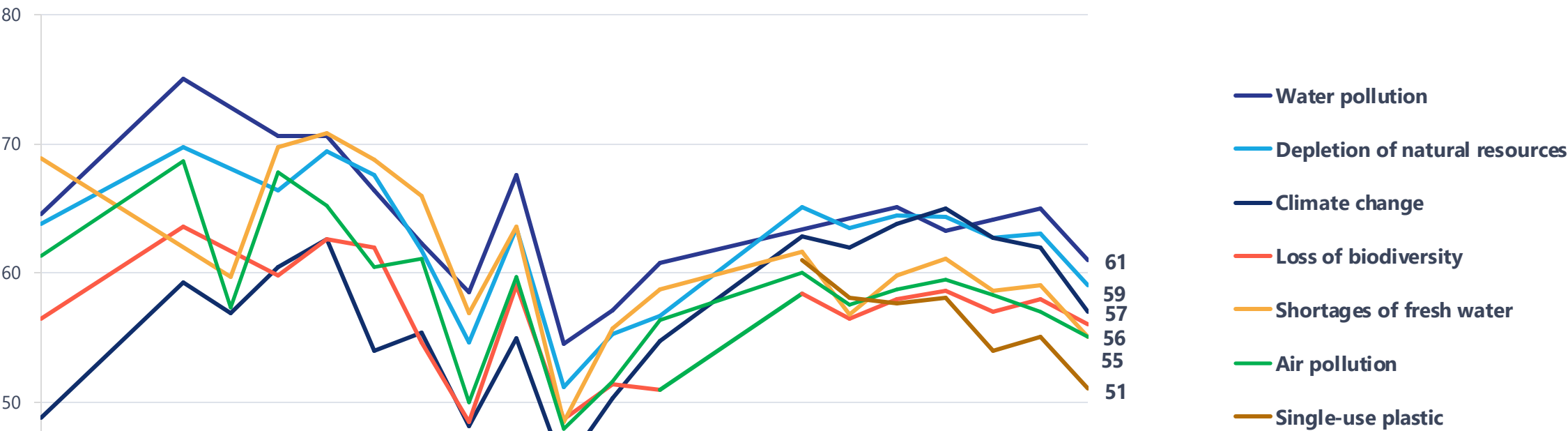


T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Concern about environmental issues continues to trend downward

Perceived Seriousness of Environmental Problems

"Very Serious," Average of 16 Markets,* 2003–2025



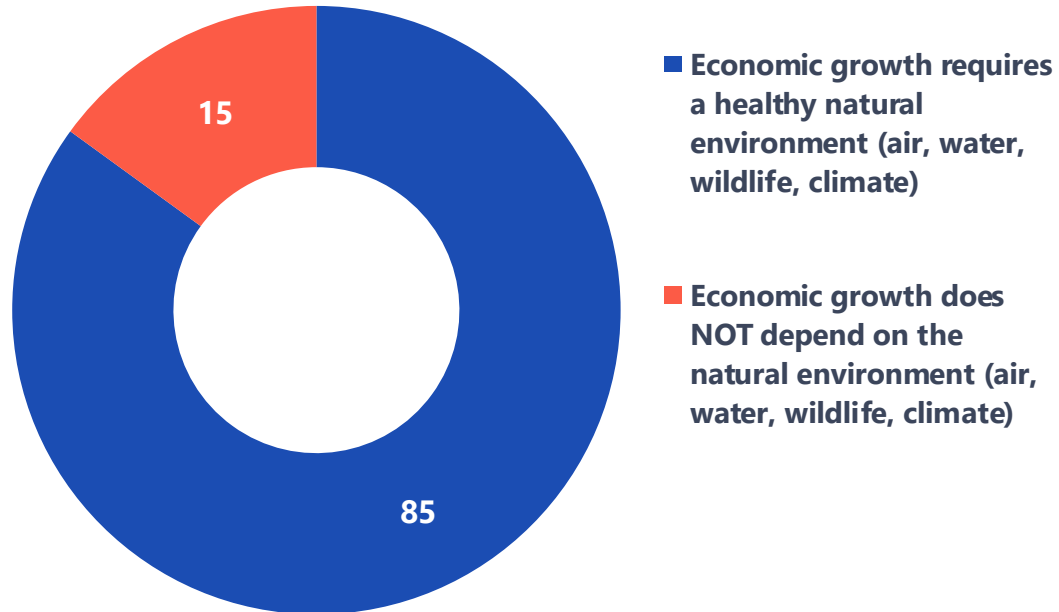
*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Spain, Türkiye, UK, and USA. Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T1. 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.

People across the world fundamentally believe that the economy requires a healthy natural environment

Economic Growth vs Natural Environment

Average of 33 Markets, 2025



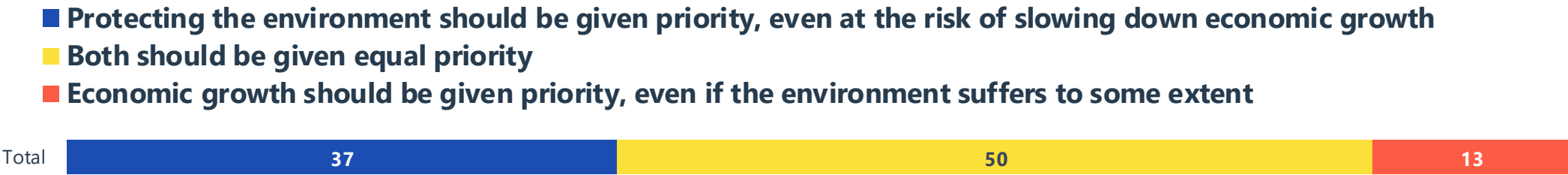
T112. Which of the following opinions is closest to your own?

Only one in eight people worldwide say economic growth should be prioritized over the environment



Attitudes on Priorities for Economic Growth

Average of 33 Markets and by Market, 2025

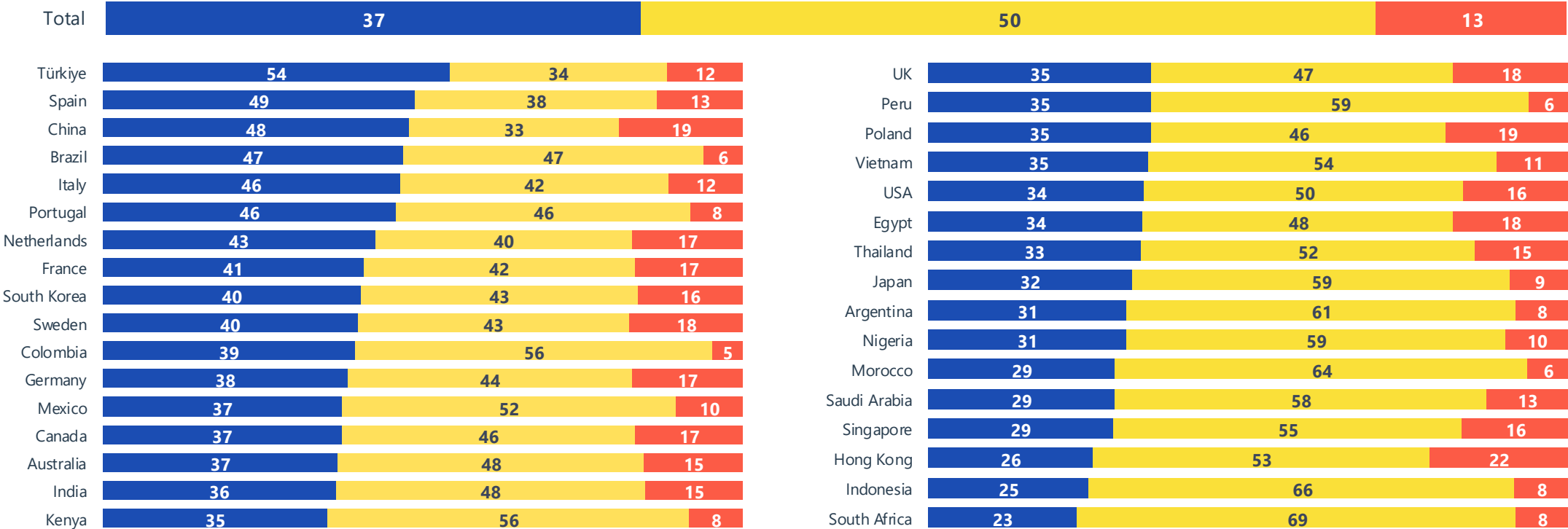


Only one in eight people worldwide say economic growth should be prioritized over the environment

Attitudes on Priorities for Economic Growth

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

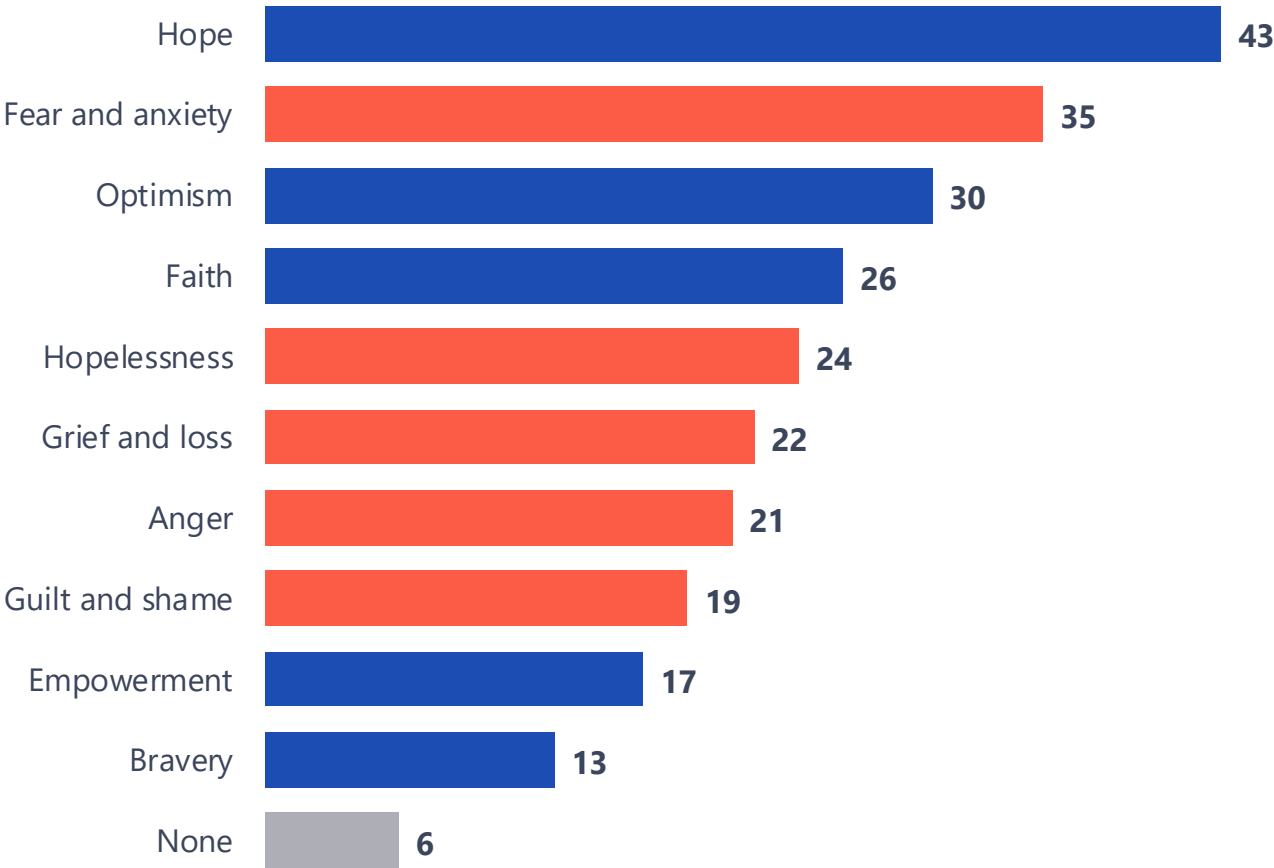


T111. With which of these statements about the environment and the economy do you most agree?

There are strong feelings of hope and optimism, but also fear and anxiety associated with what is happening to the environment

Emotional Reaction to the Environment

Total Mentions, Average of 33 Markets, 2025



T110. 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.).

PAUSE: Panelists' Comments



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Director, Asia-Pacific



Anneke Greyling
Director, Africa



Perrine Bouhana
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CEO

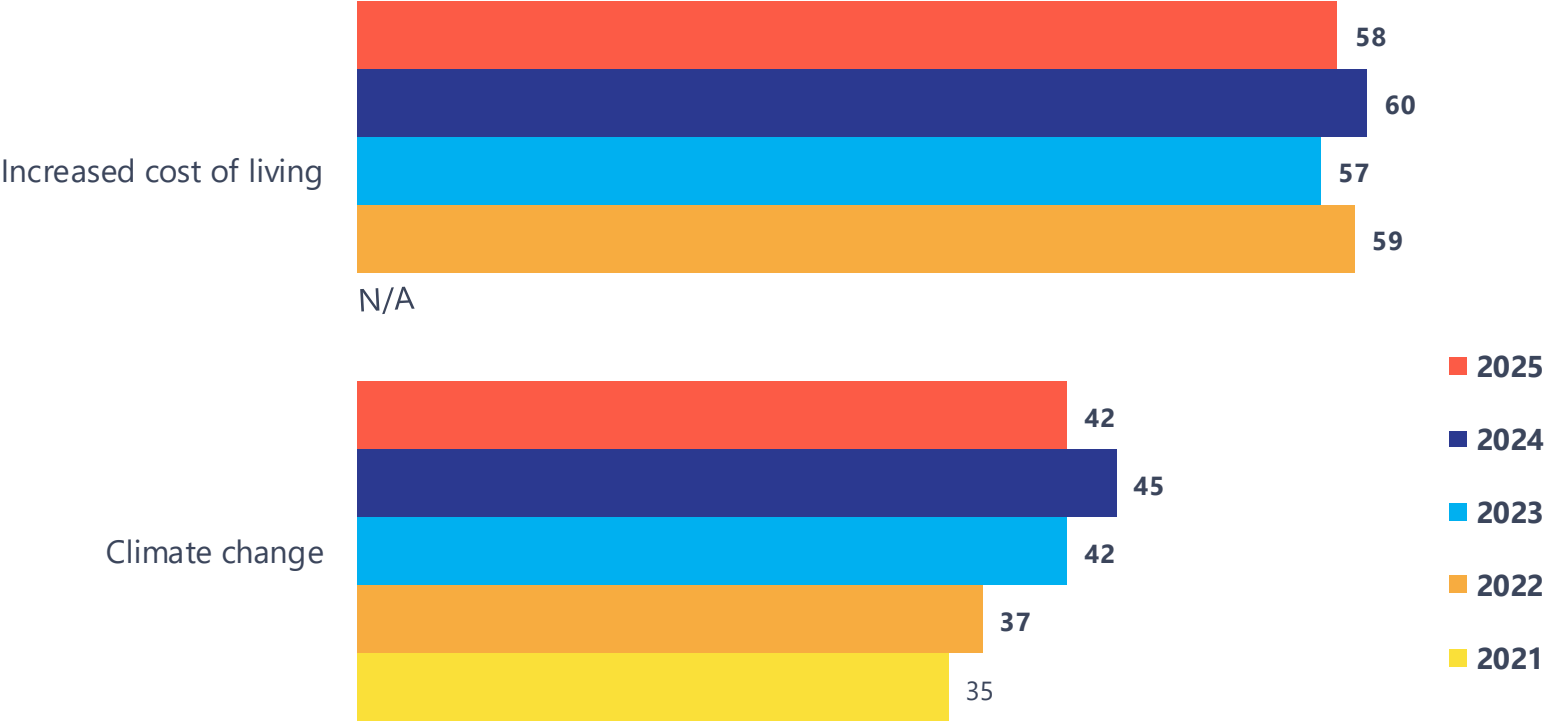
2 People are feeling climate effects but divisions about future impacts



People feel less affected by climate change than they did last year; most continue to feel greatly affected by inflation

Extent Personally Affected by Issues

“Greatly Affected,” Average of 26 Markets,* 2021–2025



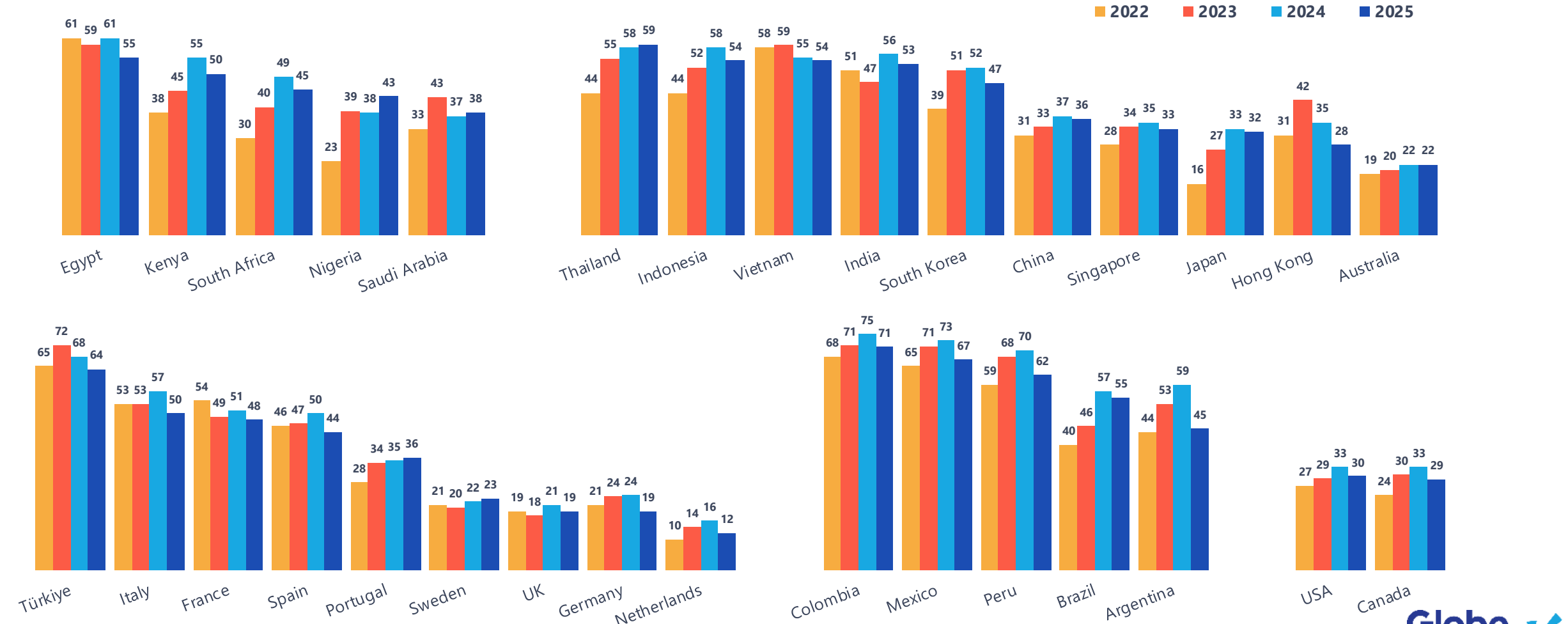
*For consistent tracking, this chart does not include Colombia, Egypt, Netherlands, Peru, and Portugal as these countries were not surveyed in 2020.

T2. How much are you personally affected by each of the following?

The impact of climate change has slightly dropped for people in most markets surveyed, most notably in Latin America

Extent Personally Affected by Climate Change

"Greatly Affected," by Market, 2022–2025



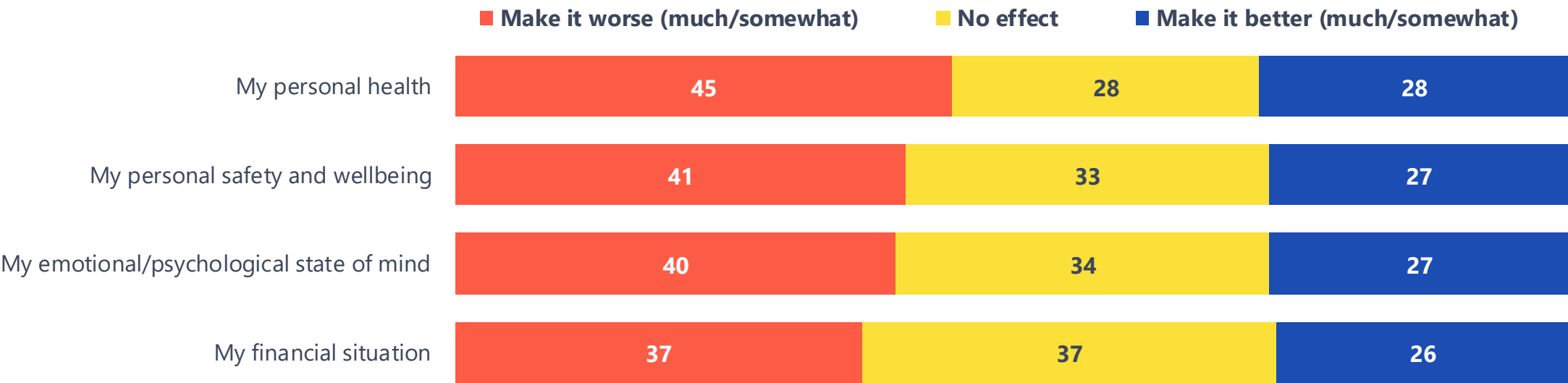
T2. How much are you personally affected by each of the following? – Climate change or global warming

Ambivalence about future climate change impacts



How People Anticipate Climate Change Will Affect Areas of Life in Next Five Years

Average of 33 Markets, 2025



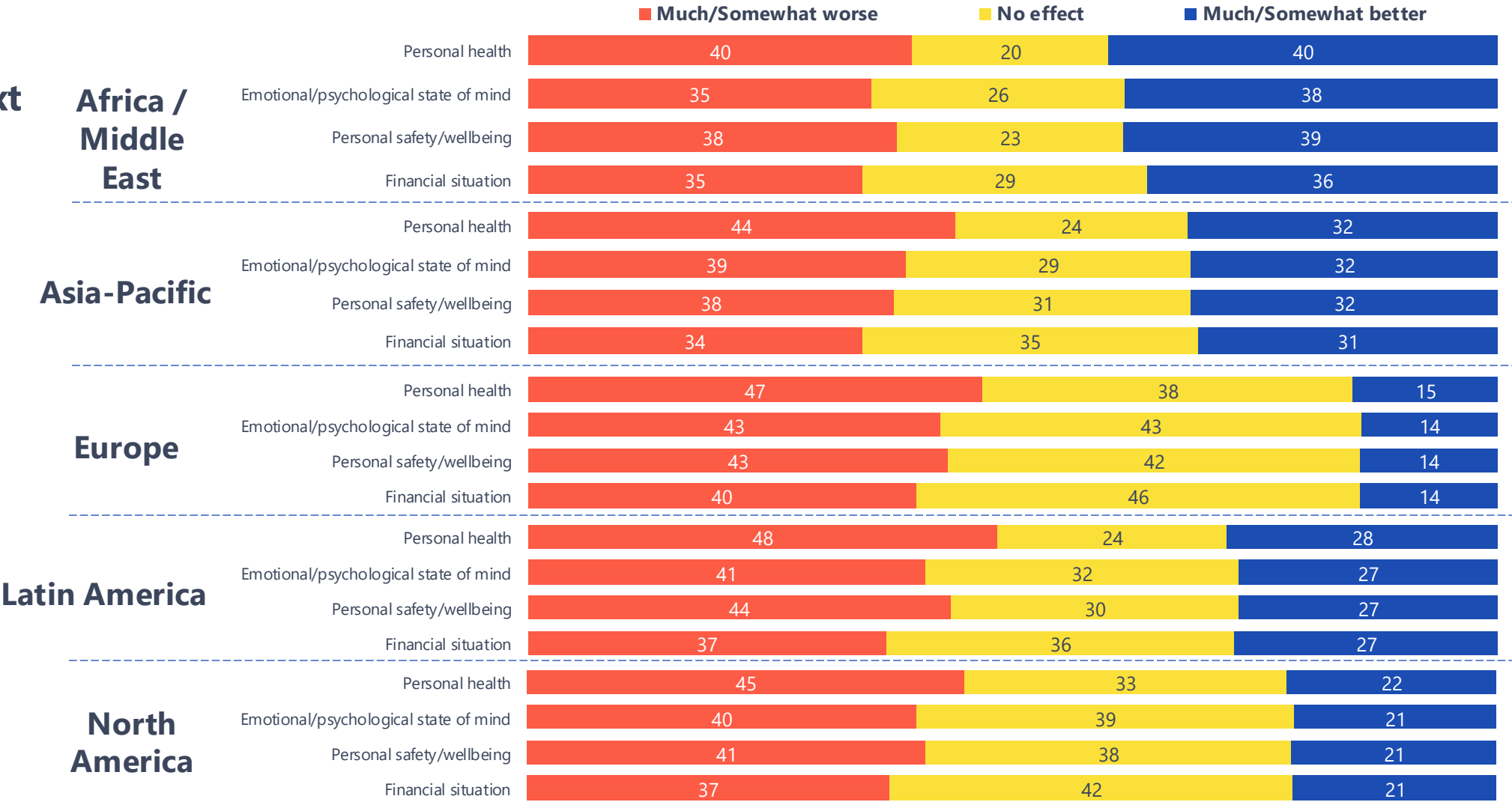
T96. And in the next five years, do you think climate change will make each of the following aspects of your life better or worse?

People in Europe are much less likely than people in other regions to anticipate that their health and wellbeing will improve because of climate change

How People Anticipate Climate Change Will Affect Areas of Life in Next Five Years

Average of 33 Markets, by Region, 2025

T96. And in the next five years, do you think climate change will make each of the following aspects of your life better or worse?



PAUSE: Panelists' Comments



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Director, Brazil



Chris Coulter
CEO

3 Global South leads in concern and commitment to change

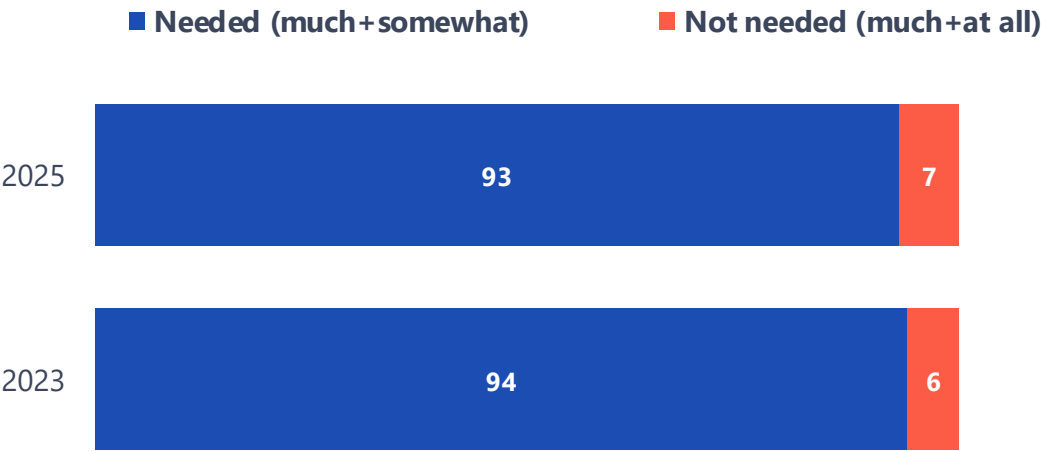


People globally continue to perceive a need for green shift and mostly think it will benefit them at a personal level

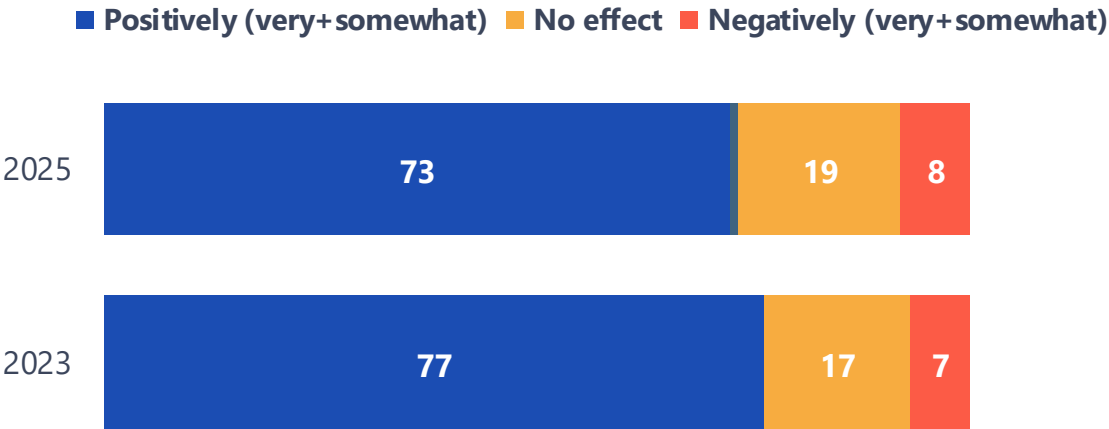
Receptiveness to Shifting to a Green Economy

Average of 31 Markets, 2023–2025

Perceived need for shifting to a green economy



Shift would affect my life and the life of my family



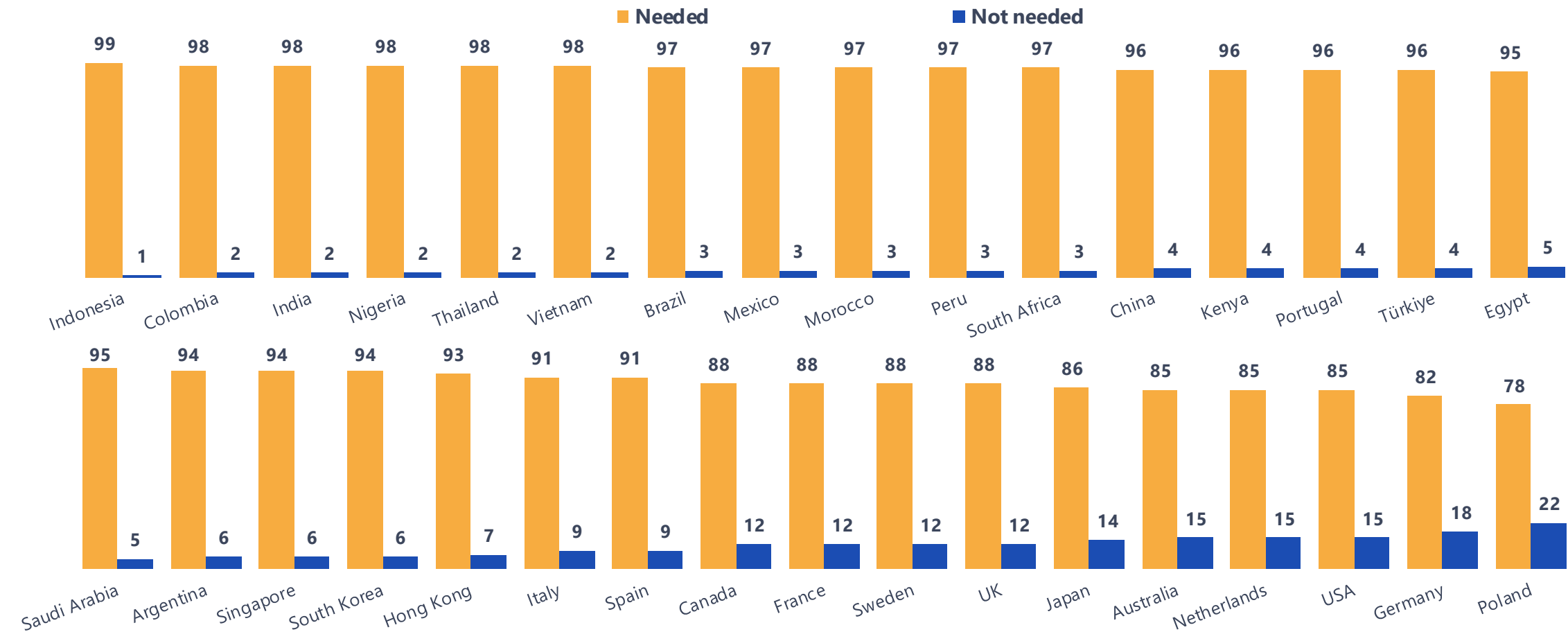
T51. In the last few years, some societies have begun shifting from fossil-based energy (e.g., oil, gas, coal) to renewable sources of energy (e.g., wind, water, solar) to address climate change. This is often called the transition to the green economy. How much would you say the shift to the green economy is needed? T52. Speaking about you personally, how would this shift to the green economy affect your life and the life of your family?

Strong support for shifting to a green economy in the Global South, while parts of Europe and Asia are less enthusiastic



Receptiveness to Shifting to a Green Economy

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



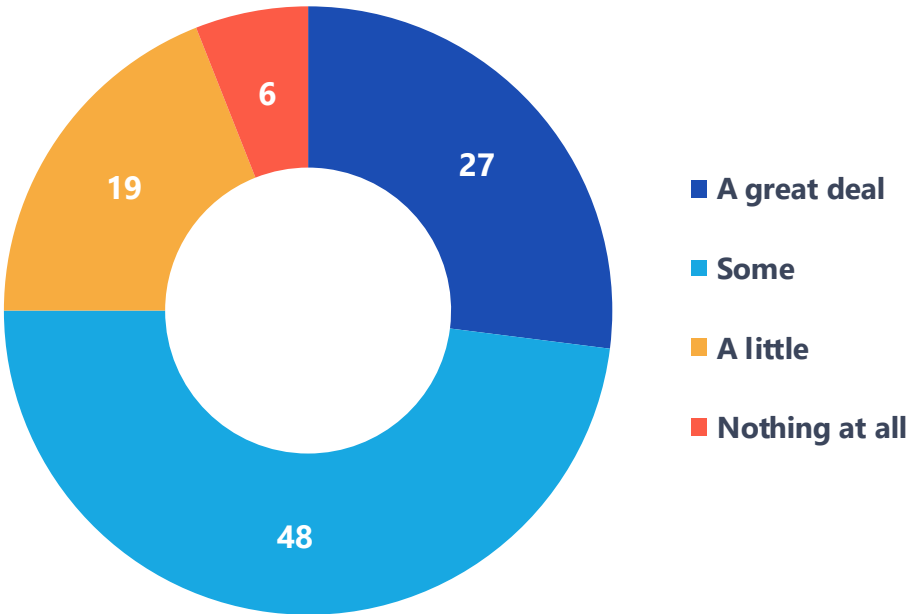
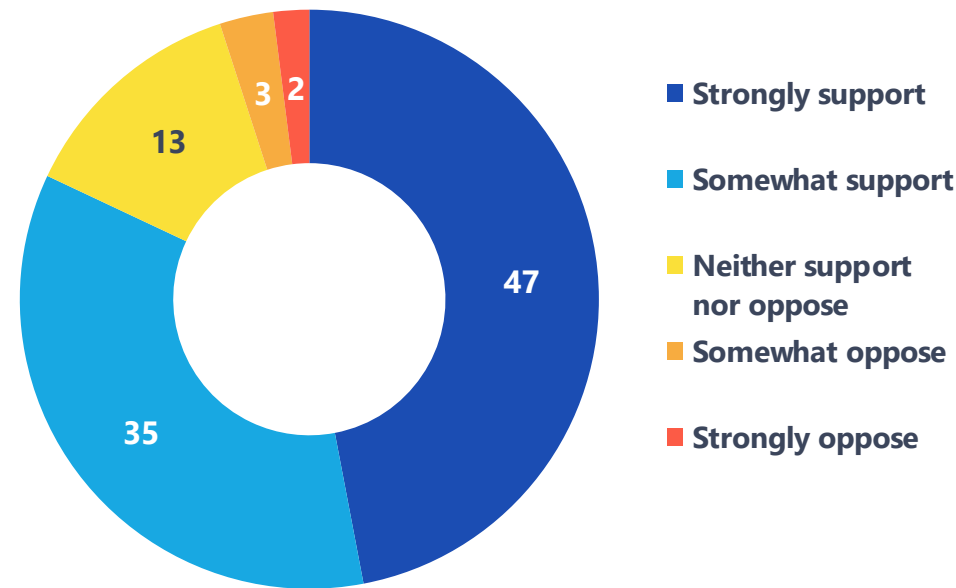
23 T51. In the last few years, some societies have begun shifting from fossil-based energy (e.g., oil, gas, coal) to renewable sources of energy (e.g., wind, water, solar) to address climate change. This is often called the transition to the green economy. How much would you say the shift to the green economy is needed?

Most people globally say they want a more environmentally friendly country; three-quarters claim they are willing to sacrifice to make the transition possible

Support for an Environmentally Friendly Country vs Willingness to Sacrifice

Average of 33 Markets, 2025

Support for an Environmentally Friendly Country



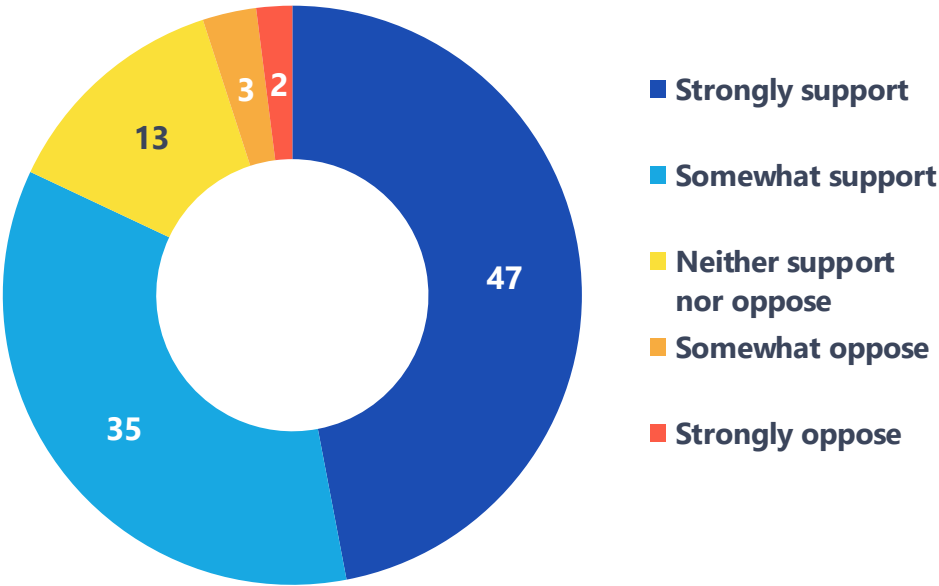
T104. Creating a more environmentally friendly country would mean more efficient use of natural resources, lower carbon emissions, and preserving nature. This would require changes in government policy, the way companies operate, and individual lifestyles. Do you support or oppose this transition? T106. 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?

Most people globally say they want a more environmentally friendly country; three-quarters claim they are willing to sacrifice to make the transition possible

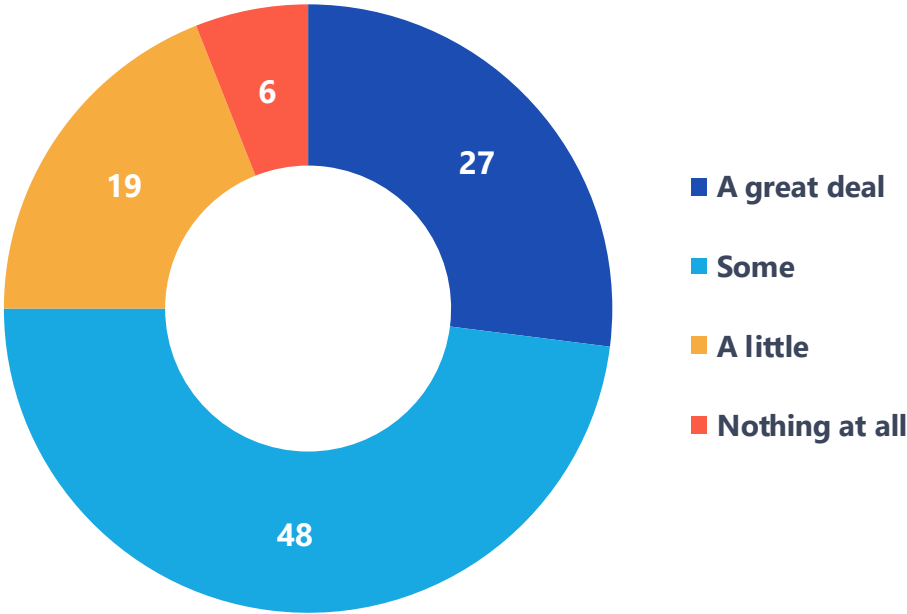
Support for an Environmentally Friendly Country vs Willingness to Sacrifice

Average of 33 Markets, 2025

Support for an Environmentally Friendly Country



Willingness to Make Sacrifices for Transition



T104. 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?

Most people globally claim willingness to make individual changes but are much less likely to say they will pay higher taxes



Willingness to Make Changes for an Environmentally Friendly Country

"Yes," Average of 33 Markets, 2025



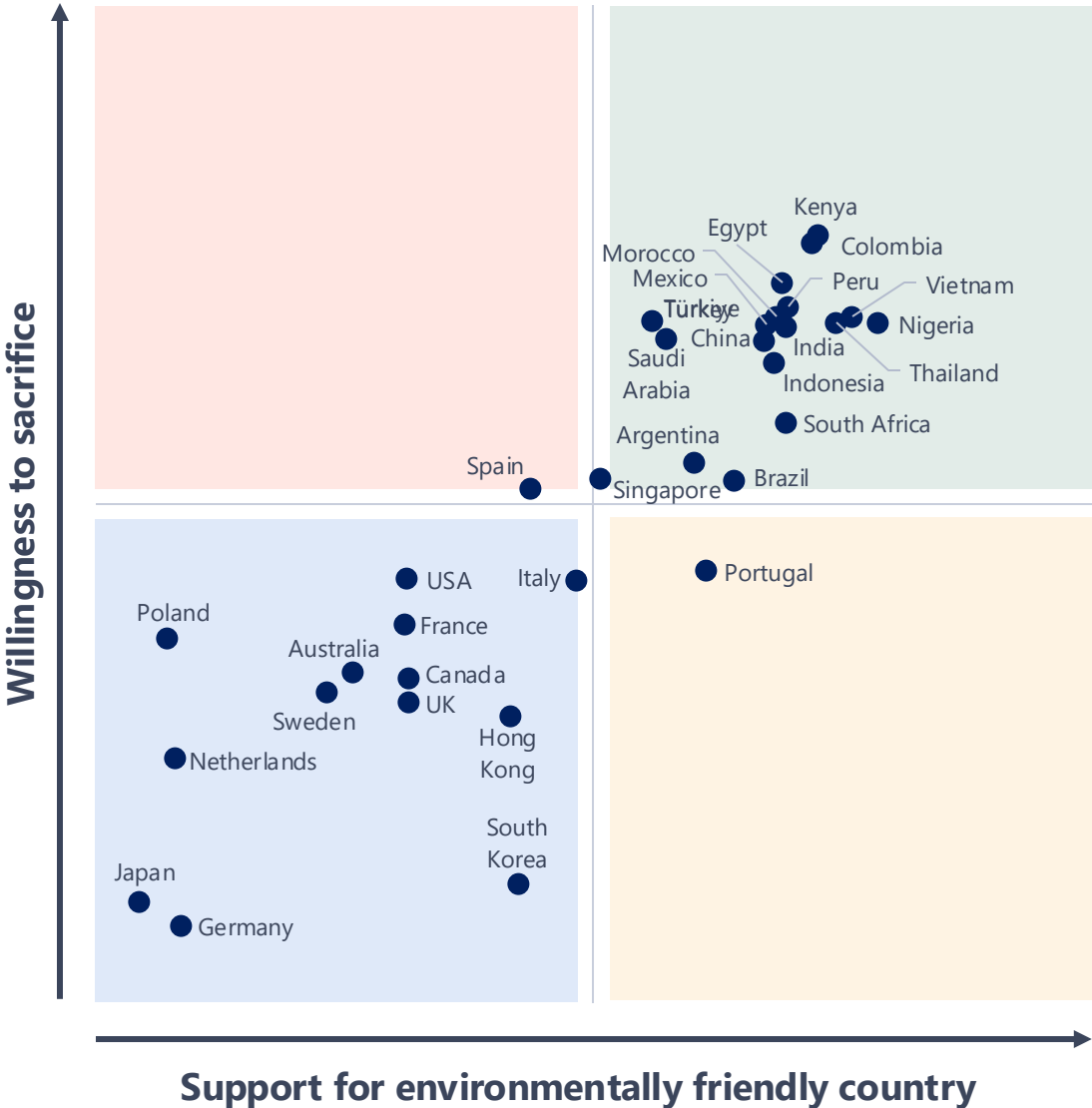
T107. Would you be willing to do any of the following changes to make the shift to an environmentally friendly country possible?

There is a strong correlation between countries supporting a more environmentally friendly country and claiming willingness to sacrifice to make transition possible

Support for an Environmentally Friendly Country vs Willingness to Sacrifice

By Market, 2025

T104. 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?



Cost is the top barrier to living a more sustainable lifestyle across all regions apart from Latin America; North Americans are more likely than people in other regions to point to unwillingness to change their current lifestyle

Top Barriers to Improving Lifestyle to Be Healthier and More Sustainable

Total Mentions, by Region, 2025

Global		Africa / Middle East		Asia-Pacific		Europe		Latin America		North America	
1	 Too expensive	 Too expensive	 Too expensive	 Too expensive	 Not enough government support	 Too expensive					
2	 Not enough government support	 Not enough government support	 Not enough government support	 Not enough government support	 Too expensive	 Not enough government support					
3	 Not enough business support	 Not enough business support	 It's inconvenient	 Not enough business support	 Not enough business support	 I like the way I live now					
4	 I like the way I live now	 Not enough NGO support	 I like the way I live now	 I like the way I live now	 Not enough NGO support	 I'm not sure how					
5	 I'm not sure how	 I like the way I live now	 Not enough business support	 I'm not sure how	 I'm not sure how	 It's inconvenient					

A Societal Shift Index

The Societal Shift Index is a tool developed to measure public sentiment and readiness for transitioning to a more environmentally friendly economy.

It is based on data collected through a multi-country survey exploring attitudes toward the green economy and environmental policy shifts. Inspired by established social attitude measurement frameworks, the index provides a standardized way to assess societal support, perceived impact, and willingness to invest in environmental transitions. It enables comparative analysis across countries, regions, and demographic groups.

How the Societal Shift Is Built

1 Investment Priority

"How much more should our country invest in transitioning to an environmentally friendly country?"

2 Perceived Necessity

"How much is the shift to the green economy needed?"

3 Personal Impact

"How would this shift affect your life and the life of your family?"

4 Willingness to Sacrifice

"How much would you be willing to sacrifice to make this transition possible?"

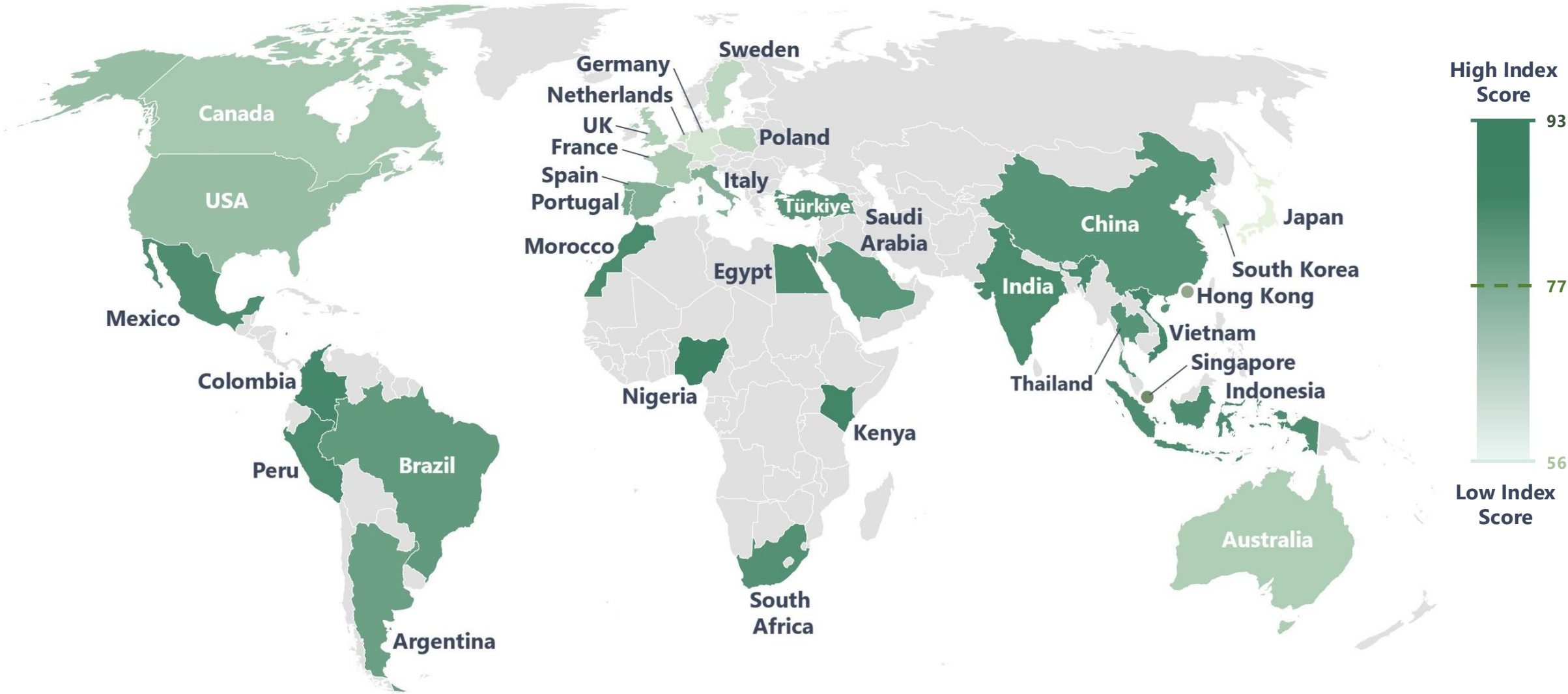
5 Support for Transition

"Do you support or oppose the transition to a more environmentally friendly country?"

Each response is scored on a scale from 0 to 1, with higher scores indicating stronger support, perceived benefit, and willingness to act. The total score (0–1) represents the overall societal readiness for environmental transition.

Societal Shift Index

By Market, 2025



PAUSE: Panelists' Comments



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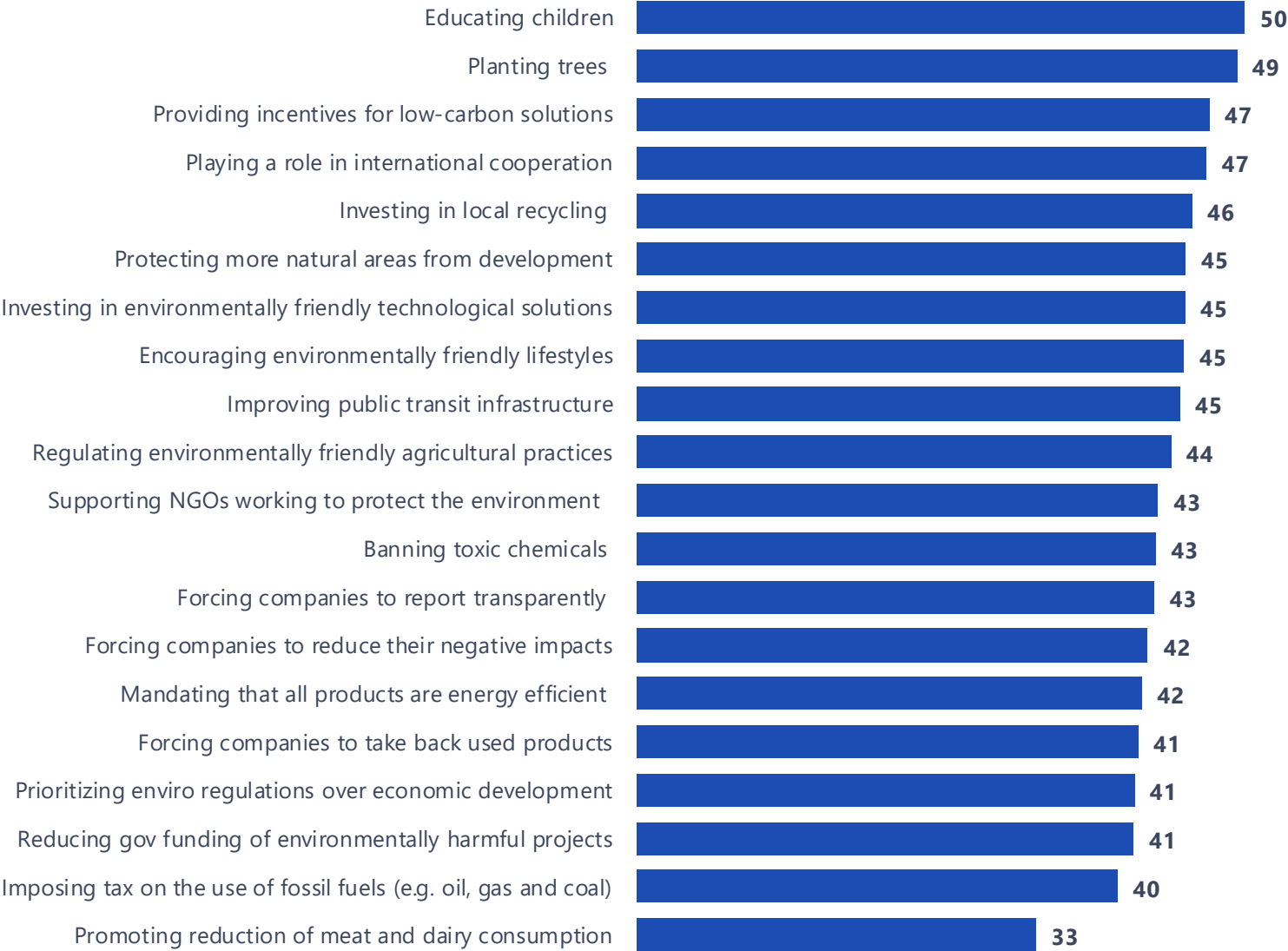
**4 Societal priorities
for sustainability are
systemic, including
leadership at COP**



Most see only modest progress in a range of policies and actions

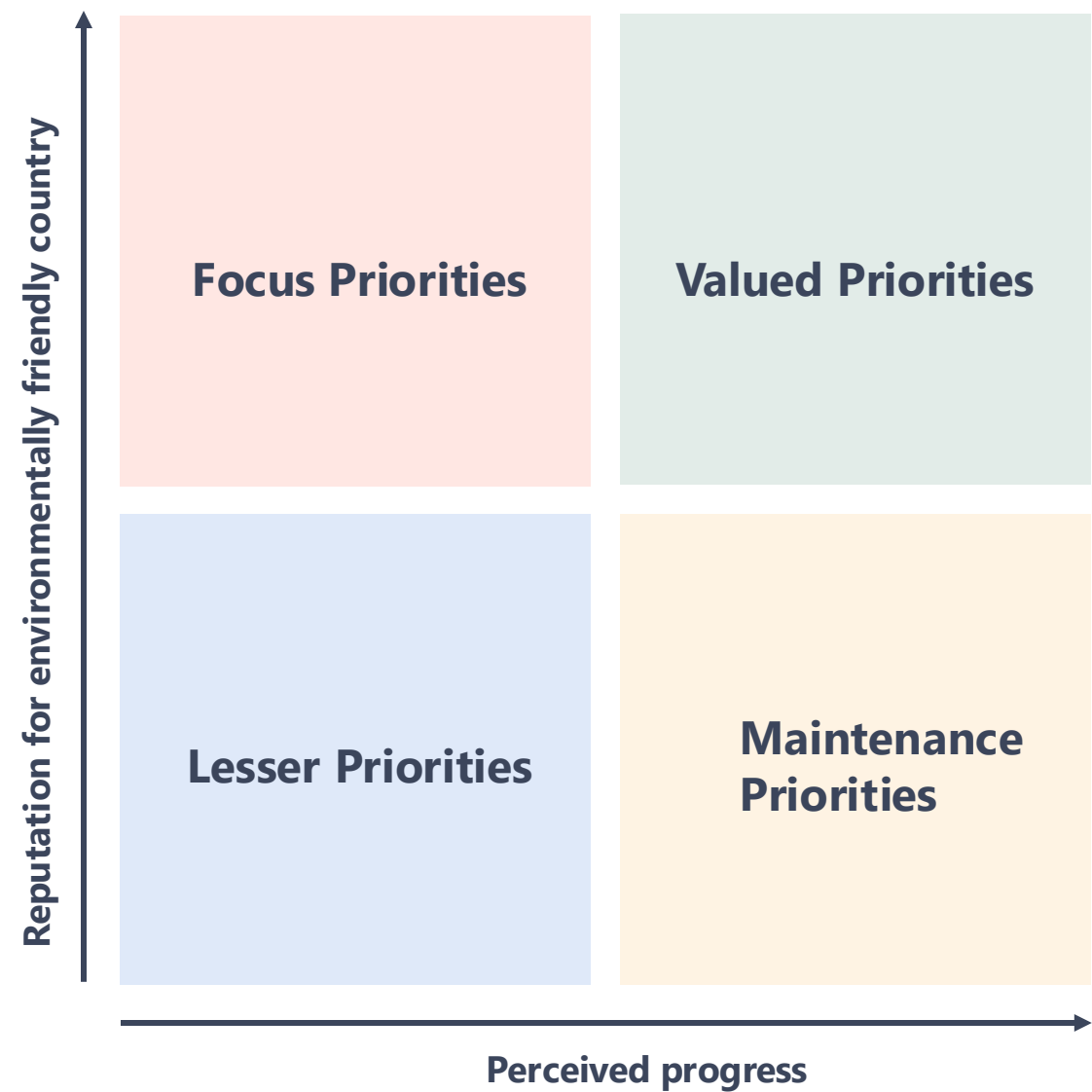
Perceived Country Progress on Environmentally Friendly Shift

“Very Significant Progress” and “Good Progress,” Average of 33 Markets, 2025



T109. Thinking about the shift to a more environmentally friendly country, please rate your country’s progress in each of the following areas.

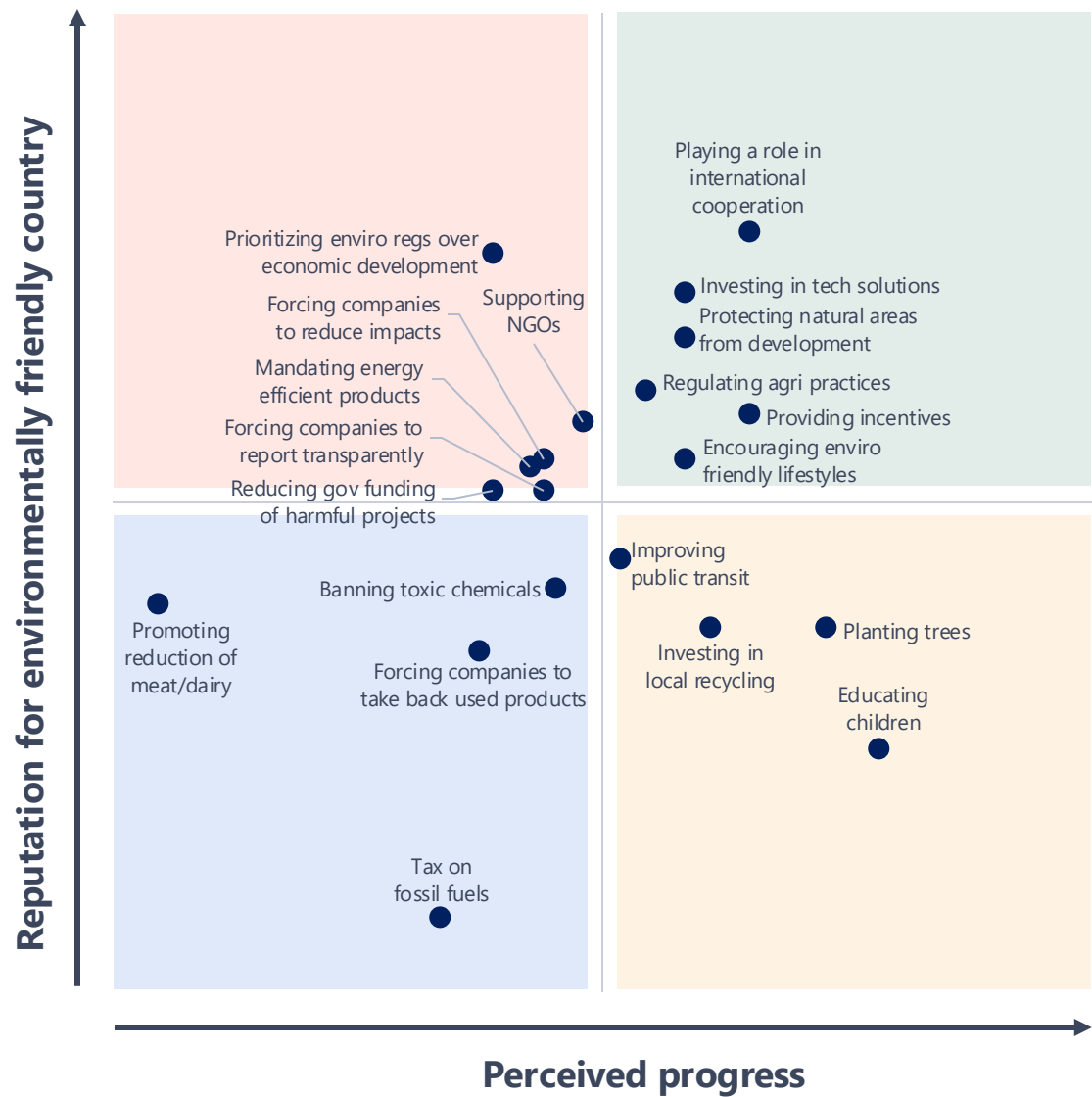
Drivers of Perceived Progress



Perceived systemic progress drives people's feeling of their country being environmentally friendly

Drivers of Perceived Progress of Societal Shift

Average of 33 Markets, 2025

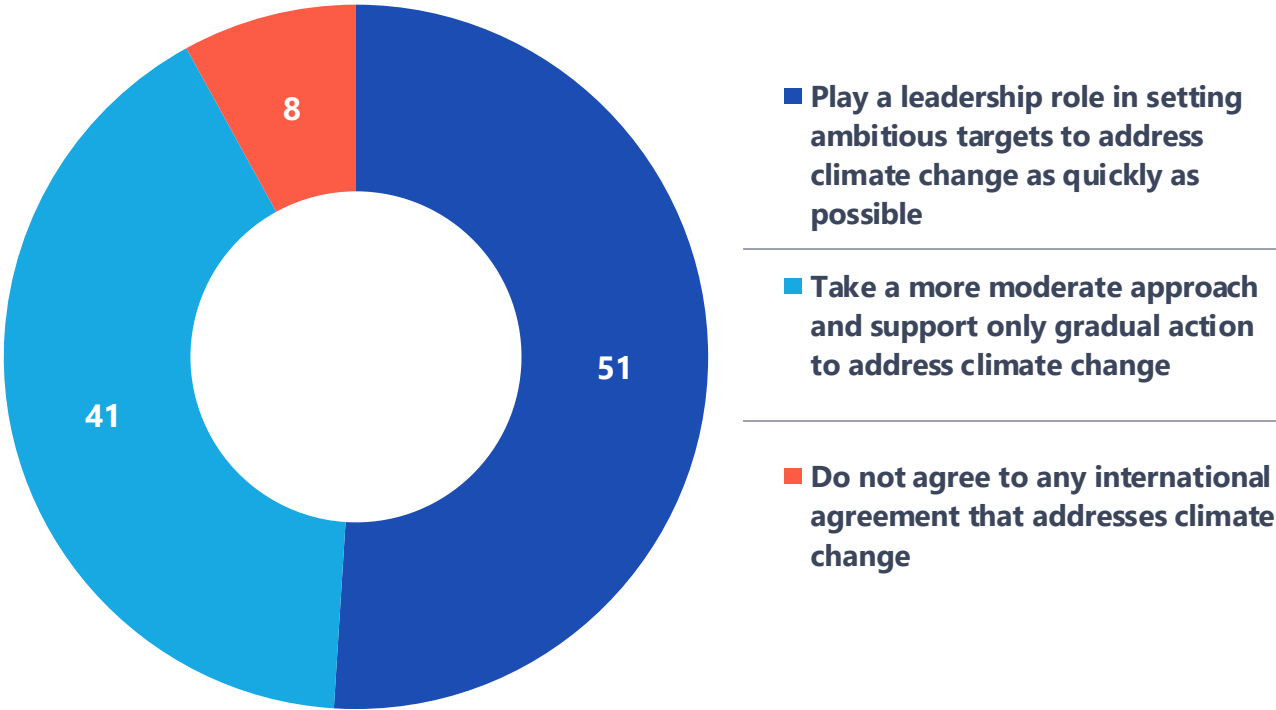


T105. How would you rate [COUNTRY's] progress in becoming a very environmentally friendly country? T109. Thinking about the shift to a more environmentally friendly country, please rate your country's progress in each of the following areas.

Half of citizens want their countries to take bold action at COP30

Preferred Country Strategy for COP30

Average of 33 Markets, 2025

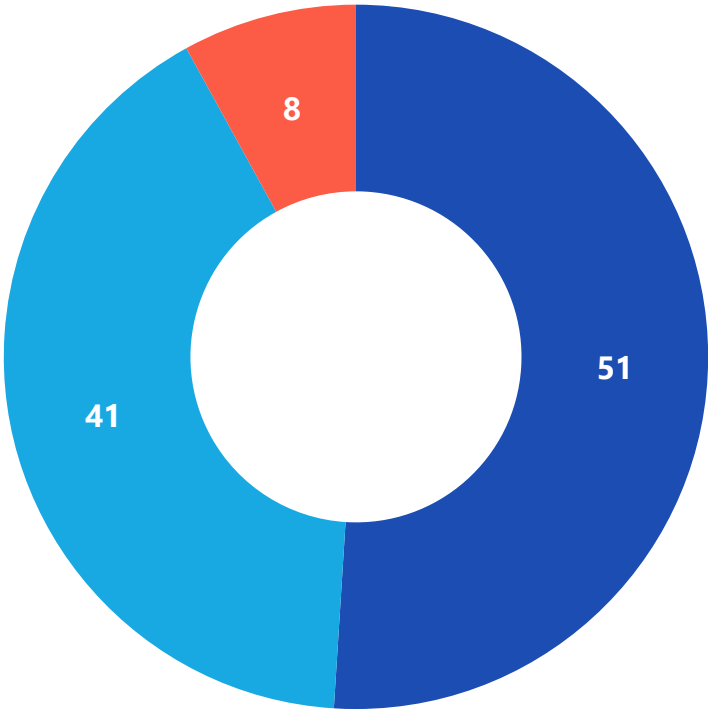


T121. In November 2025, countries from around the world, including [COUNTRY], will be meeting to discuss how they can work together to reduce emissions of gases that cause climate change or global warming.

This is higher than before the Paris Agreement

Preferred Country Strategy for COP30

Average of 33 Markets, 2025 and Average of 17 Markets, 2015–2025



	Average of 17 Markets, 2015–2025		
	COP21, Paris 2015	COP26, Glasgow 2021	COP30, Brazil 2025
■ Play a leadership role in setting ambitious targets to address climate change as quickly as possible	43	58	53
■ Take a more moderate approach and support only gradual action to address climate change	40	34	38
■ Do not agree to any international agreement that addresses climate change	8	3	9

*For consistent tracking, the table above includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Peru, South Korea, Spain, Türkiye, UK, and USA as these markets were surveyed in all tracking years referenced.

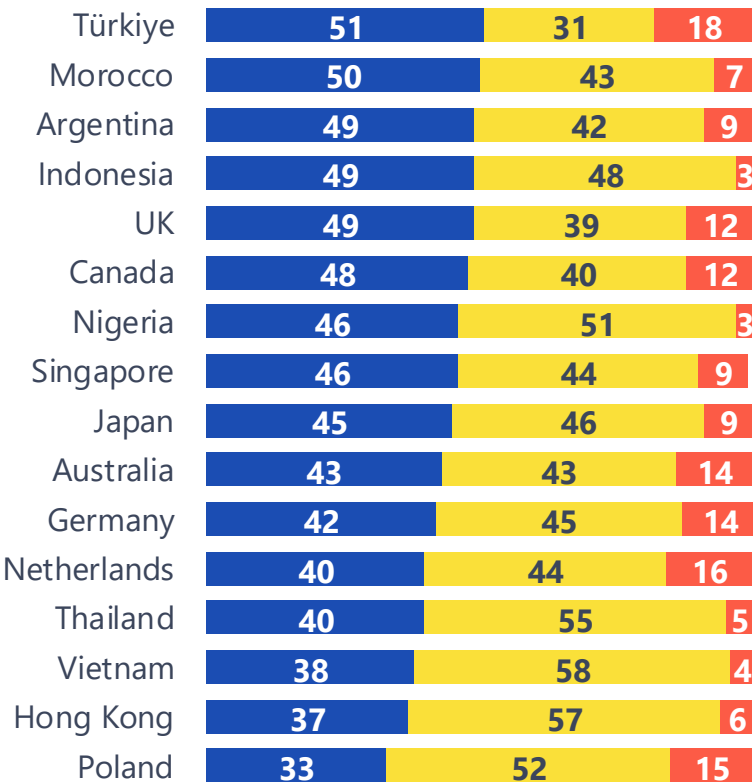
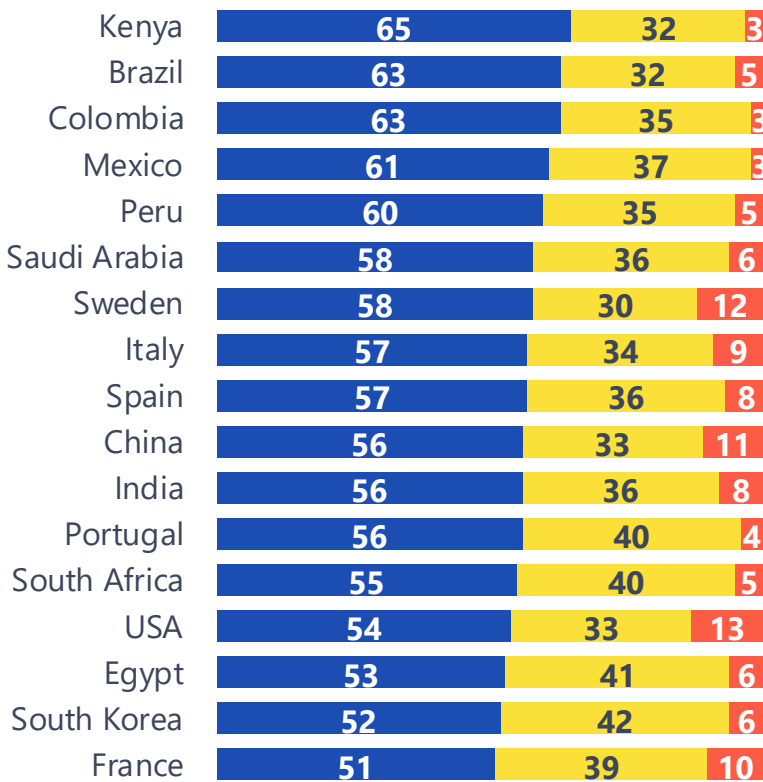
Global South most vocal in calling for climate leadership ahead of COP30

Preferred Country Strategy for COP30

Average of 33 Markets, 2025

Average of 33 countries

	51	41	8
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- 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

T121. 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?

Implications for the Societal Shift

1

Ground Strategies in Cultural and Emotional Realities

2

Reframe Sustainability around Health, Simplicity, and Security

3

Address Climate Fatigue with Tangible, Empowering Narratives

4

Align Environmental Progress with Economic Wellbeing

5

Tailor Engagement to Regional Readiness and Optimism

6

Demonstrate Systemic Leadership and Progress

PAUSE: Panelists' Comments



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Chris Coulter
CEO

Thank you for joining!

The full report will be launched October 16.
Stay tuned for updates and exclusive insights.

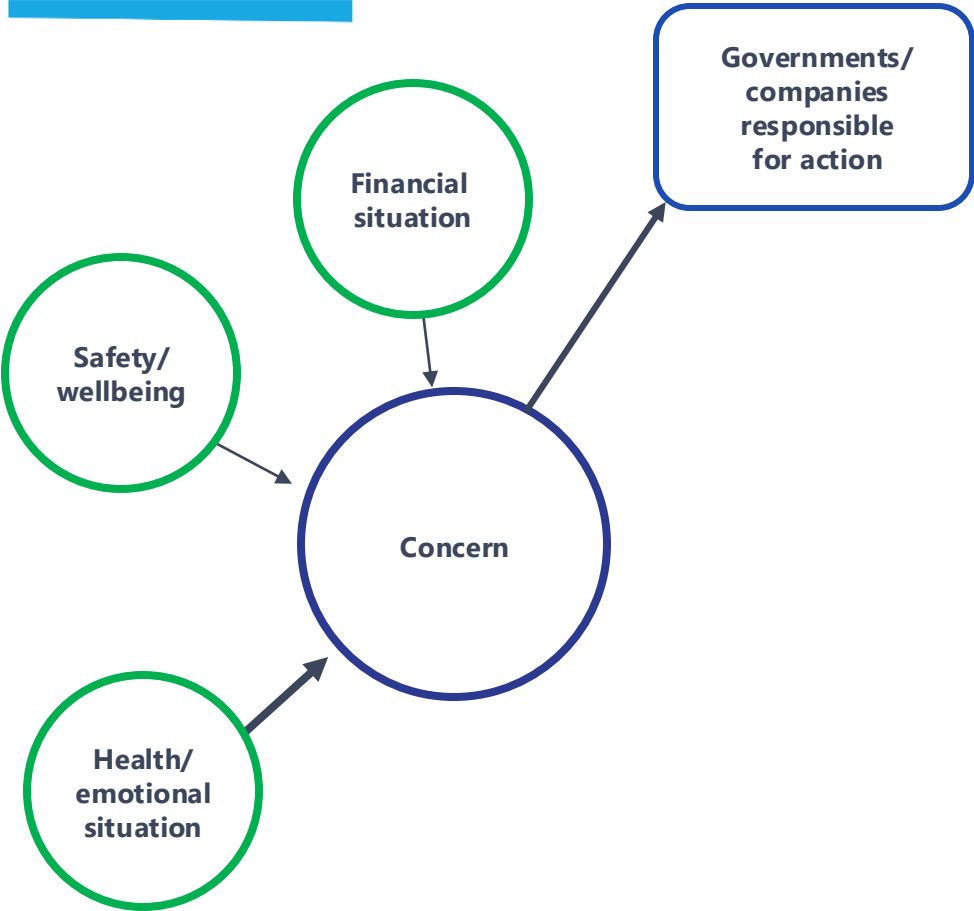
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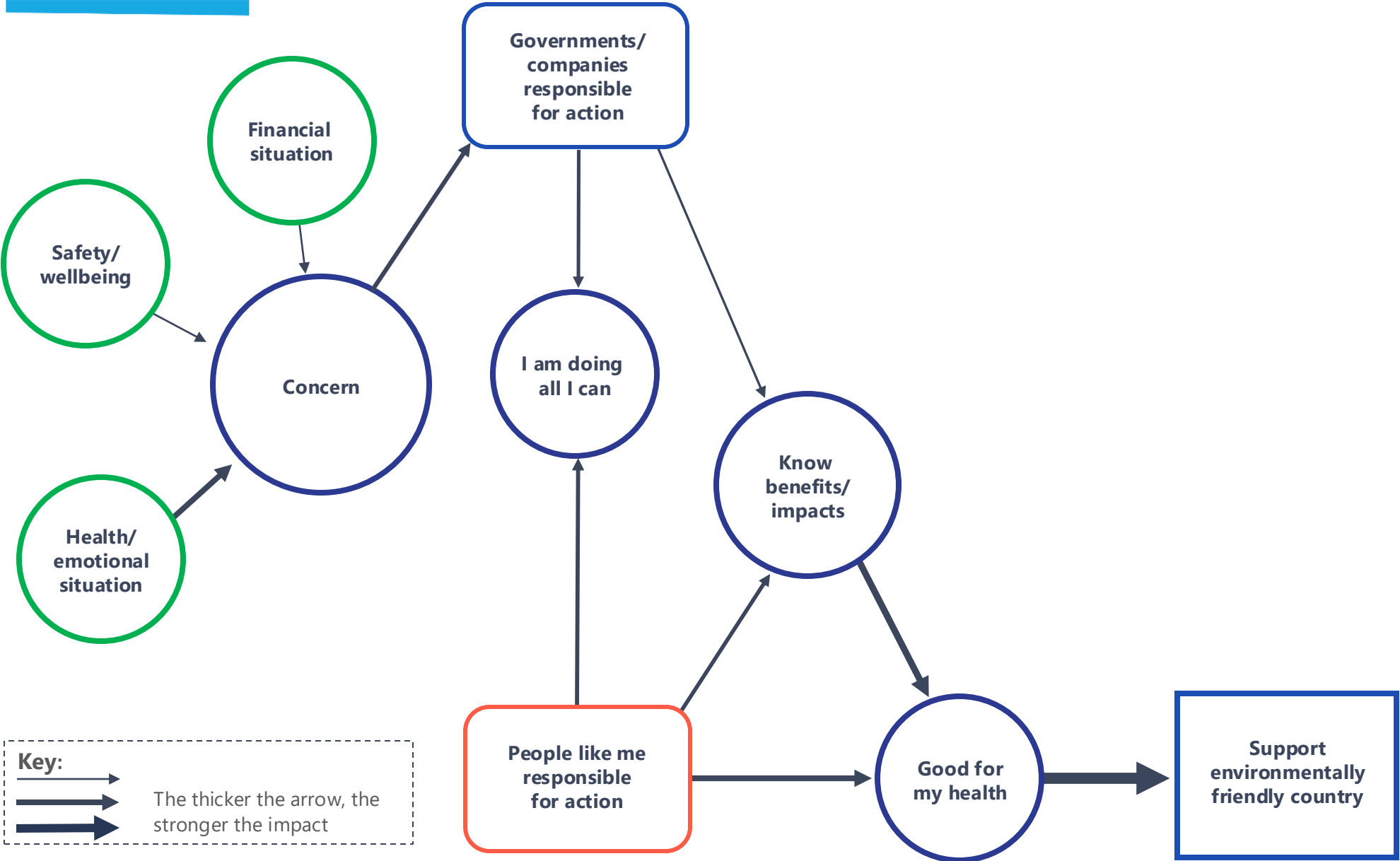
PATH Analysis



Key:

   The thicker the arrow, the stronger the impact

PATH Analysis



PATH Analysis

