WIN survey shows global climate concern remains high, but the cracks are beginning to show

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The **Worldwide Independent Network of MR (WIN)**, the leading global association of independent market research and polling firms, has released new findings from its Worldviews Survey ahead of **World Environment Day**. Based on insights from over 45,000 people across 45 countries, the data highlights a clear global consensus: **climate change remains a widely recognised and urgent issue**. However, beneath this strong agreement, **attitudes are beginning to shift**. While concern remains high, key indicators show **signs of gradual softening, as economic pressures, local realities, and institutional trust reshape how people engage with sustainability**.

The summary of findings is as follows:

Strong global concern persists but shows early signs of regional softening

Across all markets, 81% of people agree that global warming is a serious threat to mankind, demonstrating near-universal recognition of the issue. Despite this strong consensus, the data reveals a slight decline in environmental concern compared to previous years.

Regional variation further illustrates this point, with higher levels of concern observed across many APAC countries, while parts of Europe show comparatively lower levels, highlighting how local context continues to shape global attitudes.

Agreement is highest in APAC countries such as Thailand (95%), Indonesia (94%) and South Korea (93%), and in American countries such as Venezuela (93%), Colombia (92%), Mexico and Peru (89%), where climate change is widely perceived as an immediate and visible threat.

By contrast, lower levels of agreement are seen in more developed markets such as in Latvia (62%), Poland (68%), Slovenia (70%), United States, Netherlands and Slovakia (72%), highlighting a geographic divide in perceived urgency.

These differences reflect the extent to which climate change is experienced directly, with some of the countries facing more visible environmental impacts reporting higher levels of concern. While climate change remains a priority, it is increasingly competing with more immediate concerns, such as economic uncertainty and cost of living pressures.

Urgency remains high, with most maintaining that it's not 'too late.'

Despite strong levels of concern, the global public is not dominated by pessimism. 42% feel that it is 'already too late; to curtail climate change, while a majority still believes that action can make a difference.

This balance between concern and optimism is a defining feature of this year's data. Fatalistic views tend to be more prevalent in certain regions, particularly fluctuating across parts of APAC. Agreement is highest in Philippines (82%) and Malaysia (77%), suggesting a stronger sense of urgency—or fatalism—in these markets.

In contrast, significantly lower levels are observed in China (17%) and Venezuela (23%), where populations are more likely to believe that meaningful action is still possible.

Overall, the findings suggest a global mindset characterised by urgency without inevitability, people recognise the scale of the problem, but have not yet given up on solutions.

Belief in personal impact is strong but beginning to weaken

At an individual level, engagement remains relatively high, with 77% of people believing that their personal actions can improve the environment.

This belief holds across all countries and demographics, although it is slightly stronger amongst women. The data also shows a decline of 7% compared to previous years, pointing to a gradual erosion in overall confidence.

While belief in personal impact remains high globally, this confidence is not evenly distributed. It is strongest in countries such as Colombia (94%), Indonesia, Vietnam e India (91%), and Paraguay (90%), where individuals express a strong sense of agency in addressing environmental challenges. However, this drops significantly in markets such as Denmark and Japan (58%), Turkey (60%), and Latvia (61%), indicating a weaker perception of individual influence.

This shift may reflect growing frustration or fatigue, as individuals feel that their efforts are not matched by wider systemic change, or that individual behaviour alone is insufficient to address the scale of the challenge. It's safe to assume that empowerment and perceived relevance of personal action is highly dependent on local context and culture.

Responsibility is placed on governments and businesses, but confidence in action is declining

Across all regions, there is a consistent view that climate change is a systemic challenge requiring coordinated action from governments and businesses rather than individuals. This expectation remains strong over time, especially amongst younger groups and in emerging markets such as Vietnam and Morocco, where over 80% agree that institutions hold primary responsibility.

Only 46% now believe governments are taking the necessary action, a decline of 9% compared to previous years. Criticism tends to increase with age and education, suggesting more informed or experienced groups are becoming increasingly sceptical of institutional effectiveness.

Perceptions vary significantly by country and are highly influenced by recent environmental events, economic pressures, and broader levels of political trust: Confidence in government action remains relatively strong in markets such as, Vietnam (97%), China (96%) and Thailand (95%). In contrast, lower trust is seen in countries including Norway (13%), Finland (18%), Greece (21%) and other Europe countries.

Climate change is understood through real-world impacts

Perception of impact is particularly strong amongst younger people and women, and is highest in the Americas and across APAC markets.

For many people, climate change is no longer an abstract concept, but something experienced directly. 77% believe that natural disasters such as floods, wildfires, and extreme weather events have increased due to global warming, although this figure has declined slightly from 81% in 2021.

The agreement is especially pronounced in Thailand (95%), China and Venezuela (92%), India (91%) and Vietnam (90%).

Support for sustainability meets economic reality

Despite strong environmental awareness, behaviour is increasingly shaped by economic constraints. Around 65% of people say they are willing to pay more for environmentally friendly products, although this level has softened slightly over time.

Willingness to pay is higher amongst younger people and women, and is strongest in APAC markets, while Europe tends to show lower levels.

These findings suggest that while support for sustainability remains broadly positive, financial pressures are limiting the extent to which people can translate values into behaviour.

The intention-action gap remains a defining challenge

A key insight from the study is the persistent gap between aspiration and behaviour: 62% say they would like to live more sustainably but struggle to make lasting changes.

This gap is particularly pronounced in countries such as South Korea (86%), Philippines and Thailand (79%), and Ecuador (78%) and Mexico (77%), while lower levels are seen in Netherlands (41%), Sweden (43%) and Vietnam (42%).

While awareness and intent are widespread, barriers such as cost, convenience, infrastructure, and habits continue to limit action. Ultimately, the challenge is no longer about raising awareness, but enabling people to act in practical and accessible ways.

Richard Colwell, President of WIN International Association, said:

"The data shows that concern about climate change remains deeply embedded across societies worldwide, but we are entering a new phase in how people engage with the issue. Economic realities, trust in institutions, and confidence in individual impact are all shaping behaviour. People still believe change is possible but increasingly expect governments and businesses to lead the way. Bridging the gap between intention and action will be critical if we are to turn awareness into meaningful progress."

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