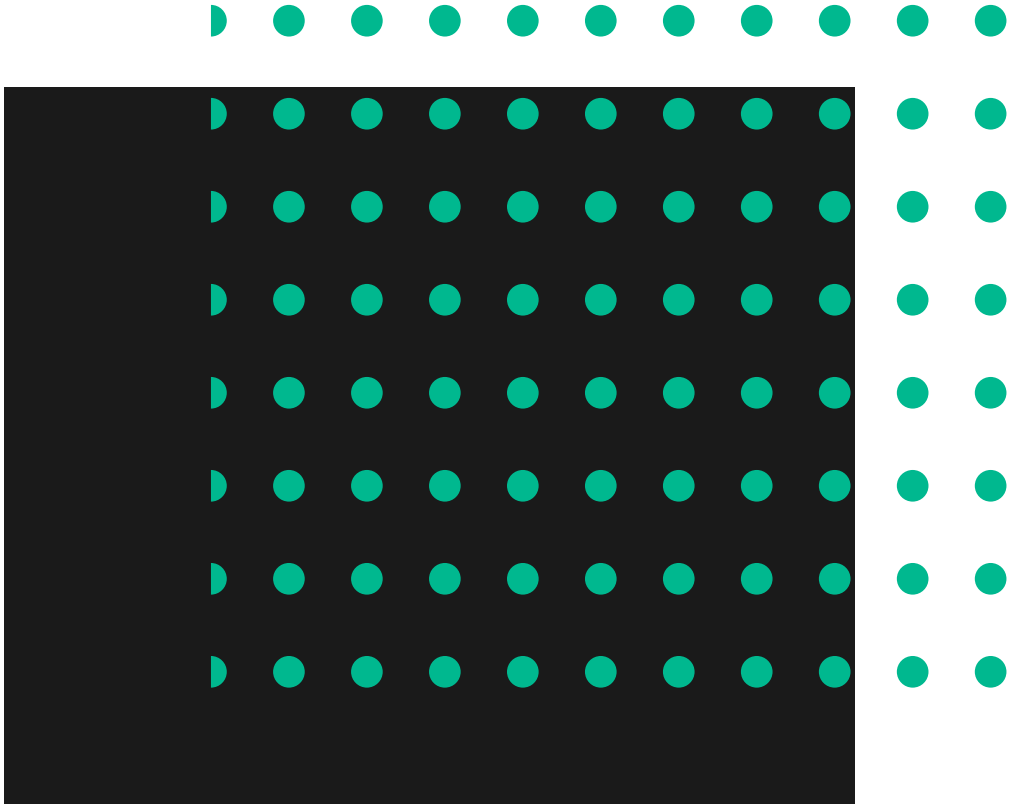
Report 07 | 2025

KAIROS FUTURE



Four Nations, Twelve Tomorrows.

In this report, we present an analysis of attitudes towards different sustainable futures in 4 European countries: **France, Germany, Spain and Poland.** How desirable do they find them? How likely? Why? And what futures seem actionable enough to make them happen? By answering these questions, we sketch out **a map of the future**.

Co-funded by the European Union

SCIENCE PARK BORÅS
FROM IDEA TO SUSTAINABLE IMPACT

TEXTILE MOVEMENT

TEXTILE & FASHION 2030

FOREWORD

In a rapidly evolving world, understanding the motivations and decisions of consumers has never been more critical. This reports highlights insights from selected European countries, where individuals are shaping the future through their purchasing choices. What drives these decisions? What influences the selection of products and services, and how do values such as sustainability, functionality, and innovation affect consumption patterns?

At the forefront of this exploration stands Science Park Borås at the University of Borås—a leading innovation environment in system innovation. With a dedicated focus on the transition of the textile and fashion industry, societal transformation, and sustainable consumption, Science Park Borås is committed to pioneering change. Since 2019, the innovation hub has published knowledge reports on sustainable consumption, providing valuable insights and support to businesses and other stakeholders working towards the transition from a linear economy to a more sustainable and circular future.

This report aims to contribute to that ongoing discourse, offering perspectives on consumer behaviors and aspirations while highlighting the crucial role of informed decision-making in fostering a more responsible marketplace. Through research and collaboration, we take yet another step toward a future where consumption aligns with sustainability, innovation, and lasting positive impact.

Birgitta Losman, project manager of the report & Erik Bresky, CEO

EXECUTIVE SUMMARY

What kind of sustainable future do Europeans want? And what do they believe is possible? This report explores that question by presenting twelve distinct scenarios for 2035, each describing a possible path toward a more sustainable society. Survey responses from 2,358 individuals across France, Germany, Spain, and Poland reveal a fascinating and sometimes surprising picture of how people today relate to long-term change.

While views differ across countries, the study uncovers striking similarities. Incentive-based solutions are consistently more appealing than those based on bans or restrictions. Scenarios like Radical Circularity and Production Close to Home receive strong support across the board, suggesting a clear appetite for solutions that combine environmental responsibility with tangible economic and social benefits.

Conversely, scenarios that suggest increased surveillance, loss of ownership, or the exclusion of lower-income groups – such as AI Coaches for Sustainability, We Own Nothing, or Climate Consumption for the Rich – are met with widespread skepticism. Respondents value independence, equity, and transparency, and are wary of futures where technology or wealth become gatekeepers to sustainability.

Importantly, respondents demonstrate thoughtful engagement with these scenarios. Many emphasize the need for fairness and shared responsibility, while also pointing to the complexity of balancing environmental, social, and economic factors. Skepticism around political will, economic disruption, and the role of elites is frequent -but so is a desire for meaningful, systemic change.

Finally, while perceived likelihood often lags behind desirability, people are ready to think critically about the road ahead, but imagining new pathways is fundamentally difficult. The responses form a map not of what will happen, but of what could - and perhaps should - guide Europe's transition in the years to come.

METHODOLOGY

This report is based on 12 scenarios based on empirical experience of working with the transition to sustainability and circularity in the innovation environment Science Park Borås at the University of Borås and Kairos Futures' experience of scenario analysis. The model for system innovation used at Science Park Borås includes five dimensions: technology, business models, behavior/norms, policy/law and industrial infrastructure. The dimensions behavior/norms includes consumption.

Initially, a broad scope of scenarios was designed and discussed, to be narrowed down to 12 key scenarios presented to the general public in the form of a survey. These twelve scenarios were selected based on their contrast with each other, aiming to illustrate a wide range of possible futures. The survey is also designed to inform the work on system innovation and to provide knowledge support when textile and fashion companies are working on the transition to sustainable and circular business models. The wording was then refined to frame each scenario clearly. Last year, the survey was sent out to Swedish respondents. This year, respondents in France, Germany, Poland and Spain received the same survey in their respective languages. It is important to note that in surveys spanning multiple countries, cultural differences can arise in how respondents tend to answer certain types of questions (e.g. scales).

The scenarios were presented in a survey, gathering a total of 2358 responses - 605 in France, 600 in Germany, 605 in Poland and 548 in Spain. Respondents were contacted via a panel representative with regard to age (16-74), gender, and geography. The survey was conducted from the 17th to the 26nd of February 2025. Respondents were asked to gauge how desirable and likely each scenario seemed. Following the scenario questions, respondents answered a series of background questions covering political leaning, views on sustainability, as well as demographic factors such as age, gender, region, and income — standard practice in Kairos Future's long-term survey methodology.

After data collection, indices of likelihood and desirability were calculated based on the percentage difference between those who viewed each scenario as likely versus unlikely and desirable versus undesirable. The scenarios were mapped accordingly, with the likelihood index forming the X-axis and the desirability index forming the Y-axis. A likelihood index score of -1.0 indicates that 100% of respondents considered the scenario unlikely, while a score of 1.0 indicates unanimous likelihood. An index score of 0 represents a balance between respondents who viewed the scenario as likely and unlikely.

The full surveys can be downloaded here (in all languages).

TWELVE SCENARIOS

This report imagines twelve sustainable futures, briefly summarized below:

Note that the scenario working titles are simply used in the report ease of discussing them. Respondents were simply shown the scenario, not the titles. The full scenario description can be read in each scenario analysis.

Scenario working title	**Brief scenario description**
Sophisticated Incentives	Financial incentives for sustainable behavior become commonplace for consumers.
Radical circularity	At least 50% of raw materials must be recycled or reused, leading to less waste.
Catastrophe-driven consciousness	One or many major climate disasters spark greater concern for and collaboration on environmental issues worldwide.
Post-growth sustainability	People scale down their consumption and focus on sustainability without growth.
AI-coaches for sustainability	Sustainable behavior is encouraged and guided by an AI.
Production close to home	More production of goods close to the end consumer, fewer globalized supply chains.
No more ads	Advertisement is heavily curtailed and limited, both in digital and physical spaces.
We own nothing	Most products are rented or shared instead of owned and bought.
More referendums	Most climate policy is settled by referendum.
Technocrats in charge	Most climate policy is settled by technocrats and experts.
Innovation solves everything	Innovation solves most of the climate crisis without a need to reduce consumption.
Climate-consciousness as luxury	Climate consciousness becomes a high-status marker for the wealthy elites.

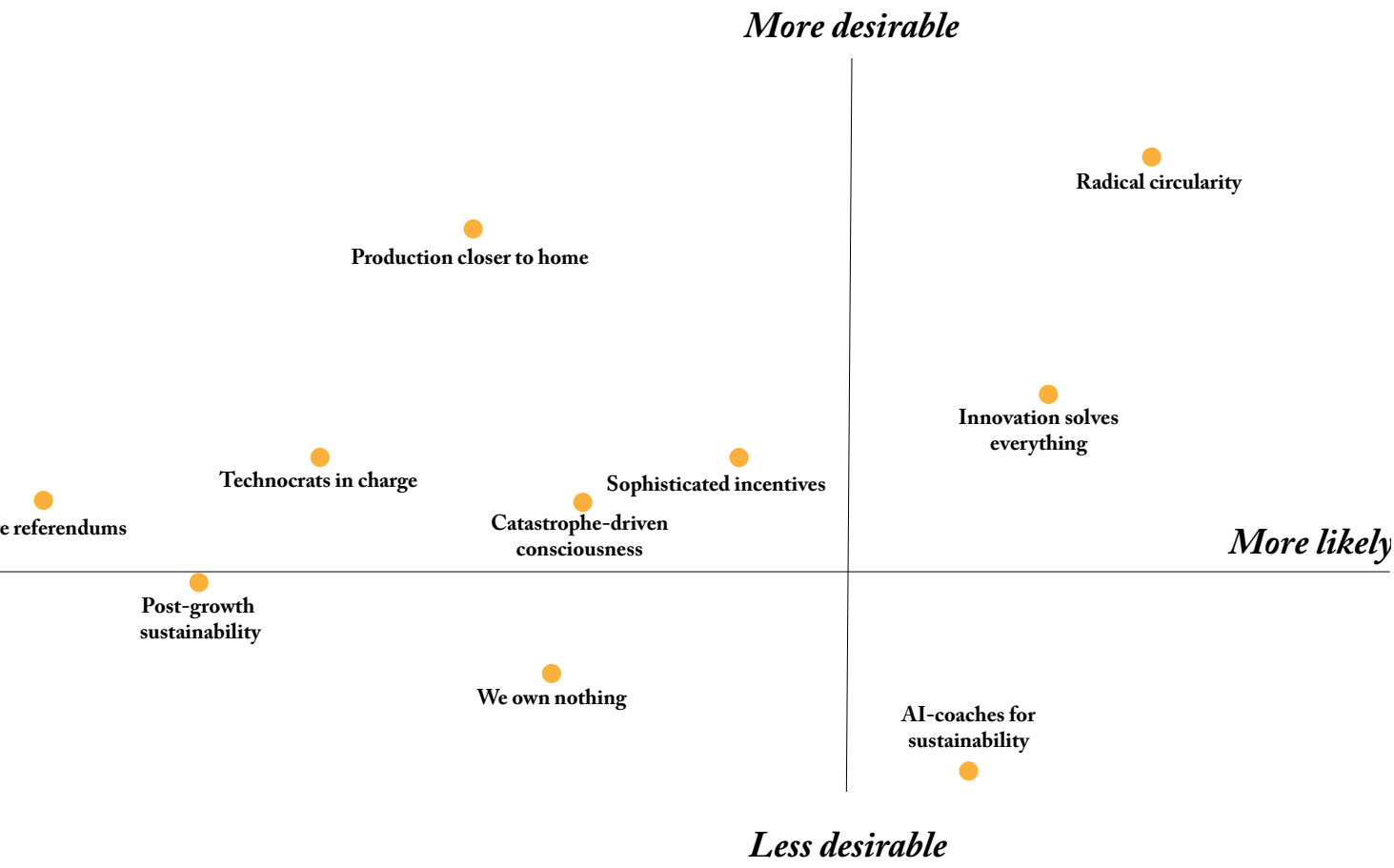
CREATING A MAP OF THE FUTURE

This map represents a synthesis of perspectives from four EU countries - France, Germany, Spain, and Poland - offering a shared view of how Europeans imagine possible sustainability futures. By aggregating responses across national contexts, the map does not aim to predict what will happen, but rather to illuminate what people find desirable, undesirable, likely or unlikely in the face of societal transformation.

The scenarios act as prompts for reflection, surfacing values, priorities, and tensions that shape public attitudes toward climate action. While national differences exist, common threads emerge: strong support for circularity, concern over surveillance and inequality, and a preference for incentives over restrictions. The combined insights provide a unique window into how a cross-section of European citizens are prepared to respond to change and what kinds of futures they are willing to pursue or resist.

In this way, the map becomes a tool - not to forecast the future, but to navigate it.

Figure 1. A conceptual map of the future. On the horizontal axis is the index for **likelihood**, with scenarios considered by more respondents to be very likely in the positive direction and very unlikely in the negative direction. Conversely, on the vertical axis is the index for **desirability**, with scenarios considered by more respondents to be very desirable in the positive direction and very undesirable in the negative direction. The index does not count those who expressed no strong opinion on the scenario. Aggregated responses by French, Poles, Spaniards and Germans aged 18-74.



FIVE TERRITORIES OF THE FUTURE

With the map arranged as above, based on the responses of those surveyed, five general "territories" or "areas" emerge. Some scenarios seem both likely and desirable, while conversely, others are neither. Simply because two scenarios are both in the same region of the map does not mean they will both become true; indeed, some scenarios might even be mutually exclusive. But dividing the map into territories allows for a simpler categorization with regards to what action would be necessary to implement or avert a given scenario. Put simply, scenarios belonging to the same territory put similar demands on decision makers and have similar paths to implementation, even if the futures they describe are wildly dissimilar. Revisiting the map with this in mind, the five territories are as follows:

The category of **hopeful futures** is marked in **green**. These are the scenarios considered both likely and desirable, positive outcomes that a majority of respondents think will occur without necessarily any further action on their own part. Looking down the road to the future, they seem possible and not like something that could or should be averted.

Dystopian futures are marked in **red**. This category (holding a single scenario) is viewed as likely, but undesirable; a negative future on the horizon that respondents would on balance prefer to avert but think will probably still occur.

Dismissed futures are marked in **brown**. This category are futures that seem neither possible nor desirable by most respondents. On balance, more find them both unlikely than likely, and undesirable than desirable. This category is essentially dismissed as futures that neither could nor should occur.

Distant futures are marked in **orange**. These are scenarios that respondents view as neutral or positive on balance; scenarios that are maybe somewhat desirable, but so unlikely that little could be done to make them happen. While some respondents would find them very positive, many also dislike them, and there is a broad consensus they probably will not occur anyway.

Actionable futures, finally, are marked in **blue**. These are scenarios that do not seem likely today, but which are considered both desirable on balance, and not too unlikely. They may seem distant today, but they are not altogether dismissed. With enough political willpower, perhaps they could still occur, despite there being no obvious path to these futures to a majority of respondents today.

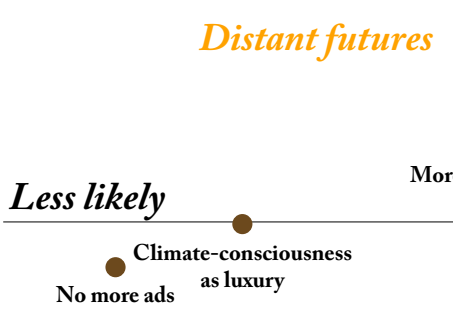
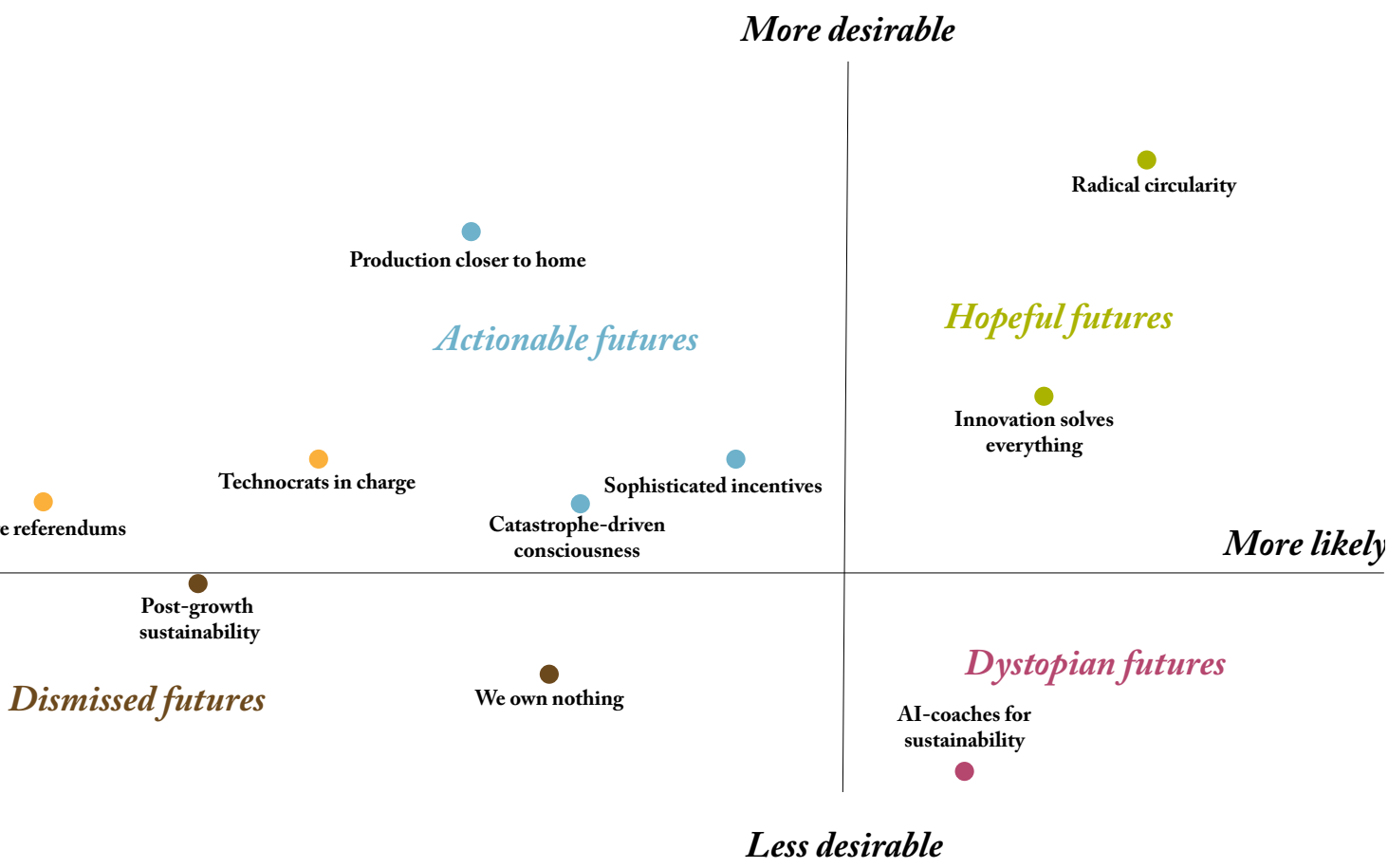


Figure 2. A map of how the different scenarios are distributed on the desirability and likelihood scales as shown in figure 1. Here they are also grouped in fives categories of futures, as explained in the text above.



HOW TO ACT?

The scenarios are particularly useful when deciding how to communicate with people and customers. The Stairway to Sustainability can be used to navigate what stage of sustainability people are in, as well as which scenarios they find desirable in each stage. **Take the time to figure out where your customers are** (in sustainability maturity) **and what they want to hear.**

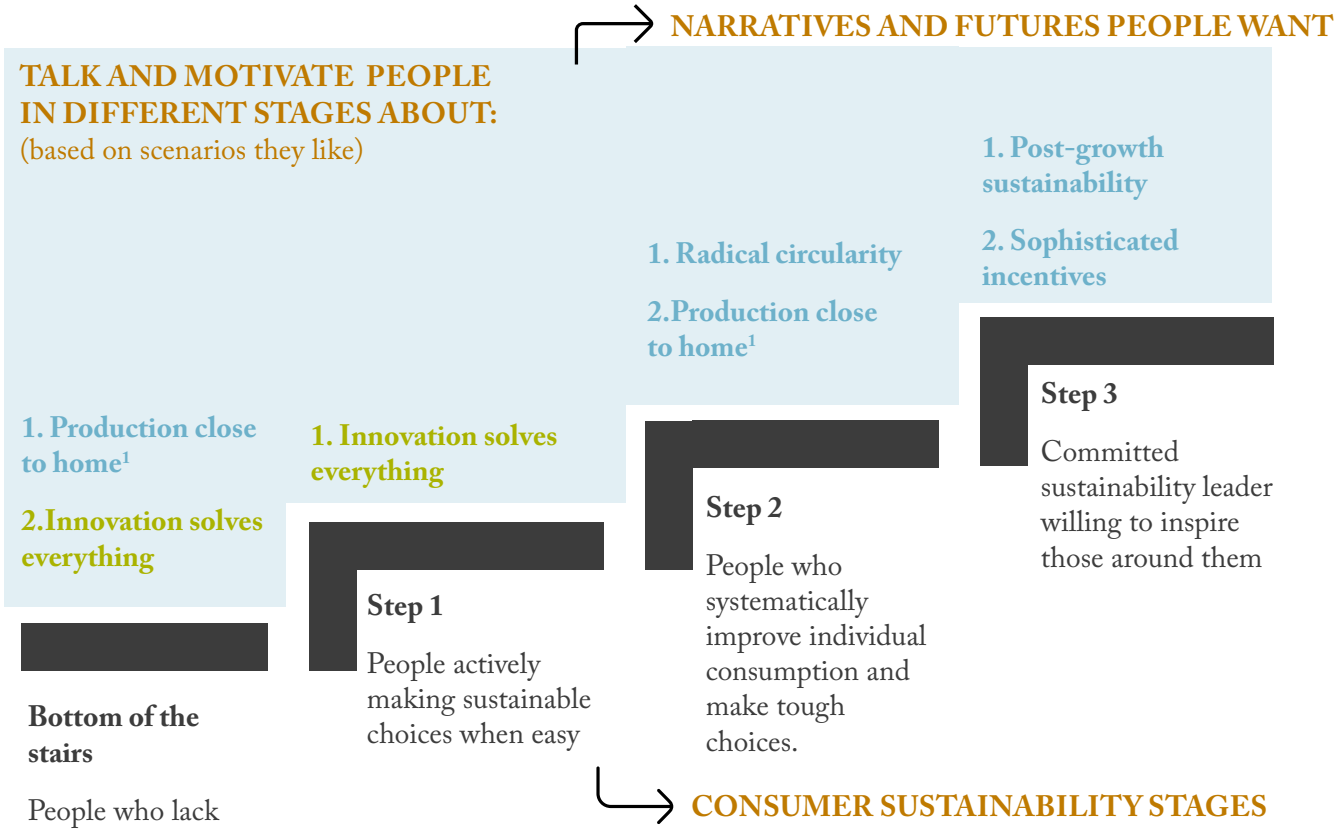
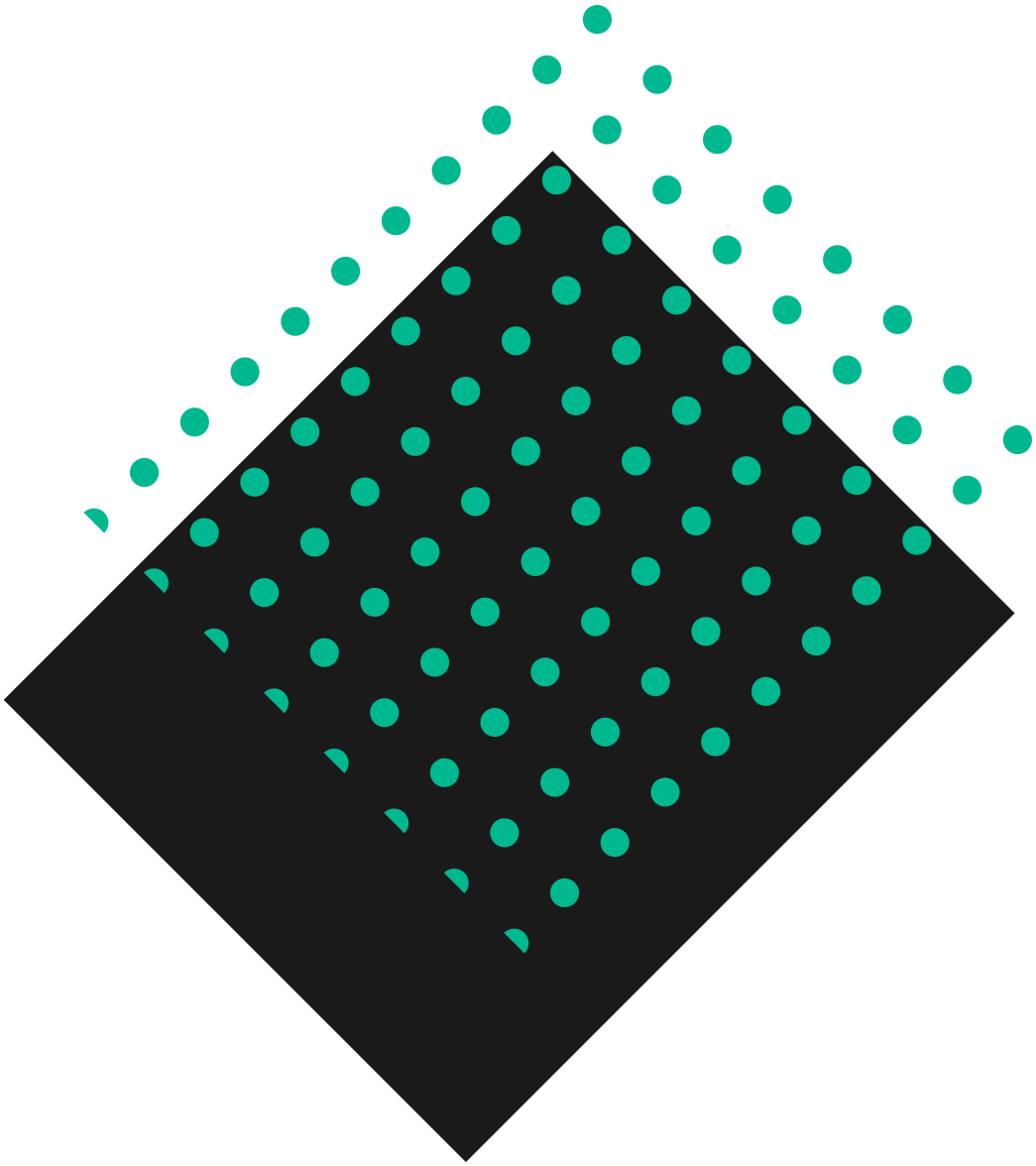


Figure 3. The **Stairway to Sutainability** model presented in previous versions of the report. Its intent is to help companies reflect on the stages that their customers find themselves in, as well as how to help them take a next step up. It is described more in detail in the 2022 report (page 74), along with tools to help companies ideate.

Based on overall popular scenarios, we looked at which scenarios were popular among the different stages that consumers find themselves in. Step 1-3 are based on answers regarding willingness to pay for sustainable products. Bottom of the stairs based on consumers who report not caring about sustainability.

1. Production close to home appears at the bottom of the stairs and in step 2. Our hypothesis is that at the bottom of the stairs, this is motivated by economics and bringing back jobs, as respondents report not caring about sustainability. In step 2, we suspect it is more strongly tied to the environmental aspects of low transports for goods.



DRIVERS AND PRIORITIES IN SUSTAINABLE CONSUMPTION

While the next chapters will explore people's attitudes toward various scenarios, it is also important to deepen the understanding of whether sustainable consumption is perceived as important - and if so, what drives it.

This chapter therefore focuses on the factors that motivate individuals to engage in sustainable consumption, with particular emphasis on what is considered most important when purchasing textiles.

CONSUMER PREFERENCE FOR RESPONSIBLE COMPANIES

Sustainability is an important factor in consumption. As illustrated in Figure 4 below, a greater proportion of respondents agree (5-7) with the statement that they would prefer to purchase goods from a company that takes social and environmental responsibility, even if it involves an additional cost, compared to those who disagree (1-3). This attitude is consistent across all participating countries and is somewhat more pronounced in Spain.

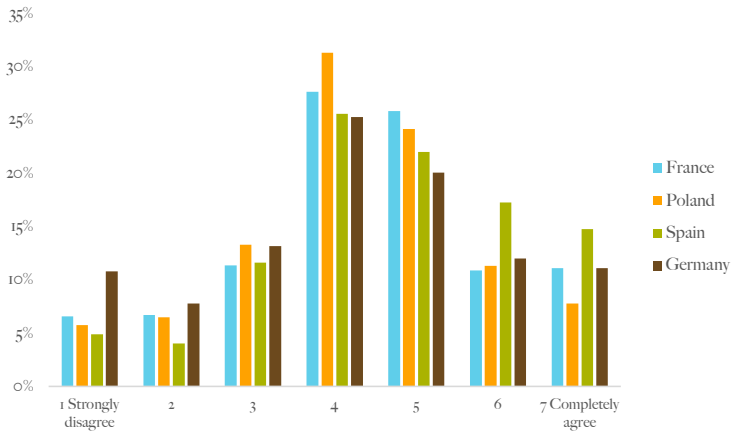


Figure 4. The distribution of the different countries on the scale for the following statement: "I prefer to buy goods from a company that is environmentally friendly, ethical and socially responsible, even if the goods are more expensive".

HEALTH AS A DRIVER OF SUSTAINABLE CONSUMPTION

This highlights the need to further explore the factors that drive sustainable consumption and the specific values that resonate most strongly with consumers.

As shown in Figure 5 below, there is a relatively consistent view among the respondents across the different countries: health, safety, and non-toxicity are the most important driving forces. This is especially pronounced in Poland, where these values are more prominent.

The idea of a simpler life with less consumption also appeals to many – particularly in Spain. Overall, the results suggest that arguments benefiting the individual carry more weight than those primarily focuses on the planet's well-being, even though the latter is not considered unimportant.

Conversely, only between 7-11 percent state that sustainability is not particularly important – indicating a general commitment to sustainable consumption.

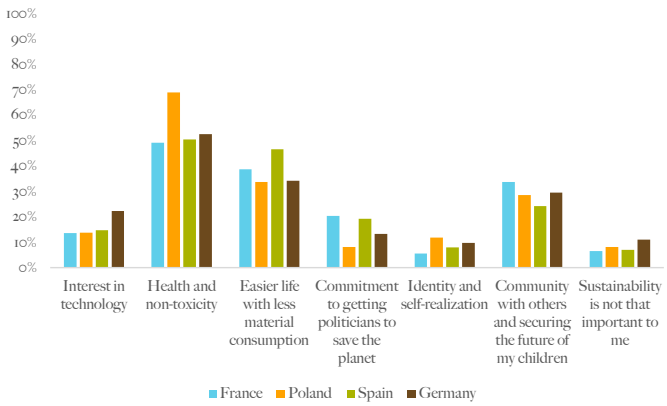


Figure 5. The most important factors regarding sustainability in the different countries. Question: When you think about sustainability, what is the most important factor for you? You can choose up to 2 options.

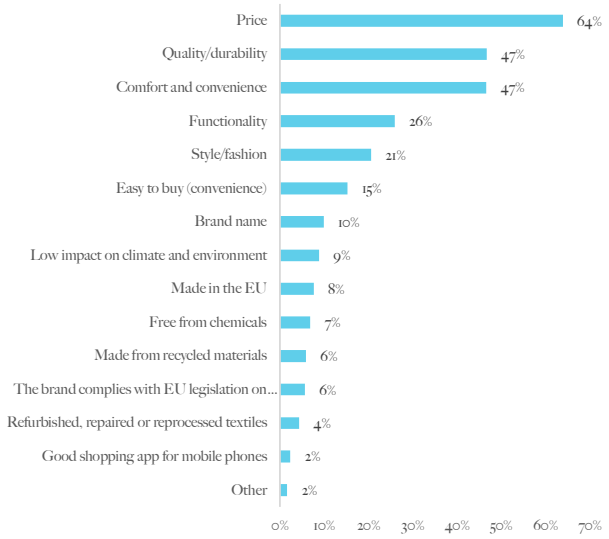


Figure 6. Most important factors in the five most recent clothing and shoe purchases across the four countries. Results are weighted to adjust for sample size differences, ensuring equal contribution from each country in the aggregated analysis

THE DOMINANCE OF PRICE, QUALITY AND COMFORT

Although health, non-toxicity, and safety are important drivers of sustainable consumption in principle, this is not always reflected in actual purchasing decisions. When respondents were asked to identify the most important factors influencing their most recent clothing and shoe purchase, concerns such as free from chemicals were overshadowed by price, quality and comfort. This result with the trio in top was consistent across all the four countries.

Considering the last years' economic downturn and broader economic developments, these results are perhaps unsurprising. They suggest that while sustainable consumption remains valued, it is not always prioritized at the point of purchase.

RECOMMENDATIONS

• **Ensure your products are safe and healthy.** Spotlight non-toxic dyes, skin-friendly fabrics, and rigorous safety testing in all marketing and labeling, because health and safety resonate more strongly with shoppers than abstract environmental benefits.

• **Keep price–value parity.** Position sustainable lines at price points and durability levels comparable to mainstream alternatives; consumers say they value sustainability, but they still buy on price, quality, and comfort first.

• **Translate sustainability into personal wins.** Frame environmental gains (lower emissions, recycled fibers) as direct lifestyle benefits – e.g., "lighter footprint, lighter wardrobe," "less clutter, more comfort" – to tap the appeal of a simpler life noted especially in Spain.

• **Show real accountability.** Provide quick-scan proofs – third-party certifications, supply-chain maps, quantified impact charts, enhanced traceability – to reassure shoppers that extra euros genuinely fund ethical and eco-responsible practices.

SOPHISTICTED INCENTIVES

Imagine that in 2035 there are sophisticated means of rewarding those who consume sustainably. For example, there could be deposit systems on all types of waste where you get money back for sorting it, or tax breaks if your carbon dioxide emissions are very low. In addition to subsidies on sustainable products, there are also tangible rewards for those who choose to consume less and assume responsibility for the environment, which are based on sharing all data about your consumption and what you consume. Conversely, the prices will be high for those who don't care.

In the world of sophisticated incentives, sustainability in 2035 is shaped through influencing consumer behavior directly, by means of incentives like tax breaks and other financial measures. Those who consume sustainably save or even make money, while those who contribute to environmental harm suffer commensurable economic consequences, on scales both large and small. This is a future in which sustainability is directly tied not just to national budgets, but also directly to household budgets – to act responsible for the environment is simply to be fiscally responsible. By aligning household budgets with climate budgets, excessive or unsustainable consumption is not altogether halted, but it is controlled, and costs to the environment are made more readily apparent to the end consumer.

THE RESULTS IN BRIEF

Sophisticated incentives are viewed positively across the surveyed countries, ranks as the 5th scenario in terms of desirability with an average of 32% finding the scenario generally desirable. Significant differences exist between countries however: Spain stands out clearly, with well over half of respondents finding the scenario very desirable, compared to France (55%), Germany (48%), and Poland (38%). Regarding likelihood, Spaniards again are the most optimistic (52%), followed by France (41%). Poland and Germany (36% and 35% respoectively) are more skeptical. Respondents generally express enthusiasm about practical incentives for sustainable behavior but harbor concerns about surveillance and the practicality of implementation.

KEY COUNTRY DIFFERENCES

Spain is notably enthusiastic, expressing high desirability and seeing the scenario as comparatively more likely. Germany and Poland are generally much more skeptical, expressing both lower desirability and higher levels of repulsion. Poland and Germany in particular, find the scenario least desirable (39% and 36% repulsive).

INDIVIDUAL RESPONSBILITY

Those who viewed this scenario positively express high levels of perceived individual agency, especially in Spain (89%) and France (83%). Poland also shows significant personal commitment (74%), whereas Germany is less confident (58%) about individual ability to contribute actively.

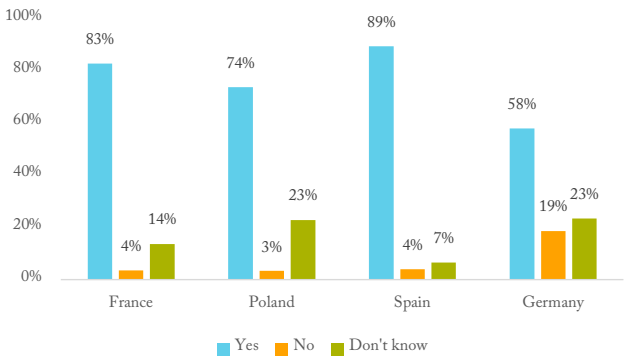


Figure 7. Share of those who found the scenario desirable and also believe they can contribute to its development.

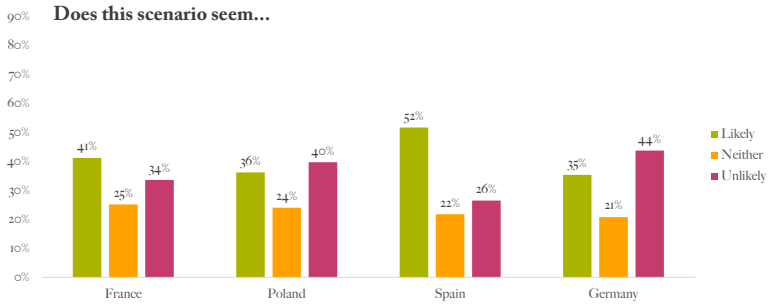


Figure 8. Proportion of the population in each country perceiving the scenario as likely/unlikely.

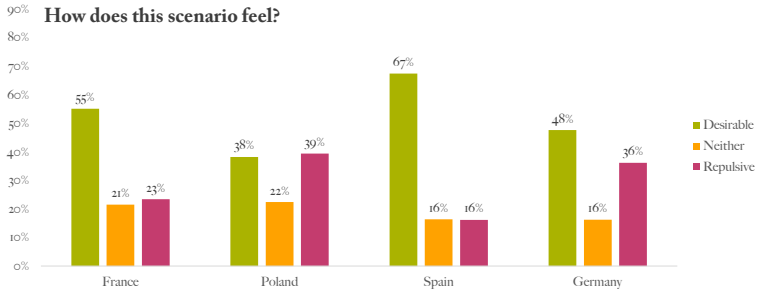
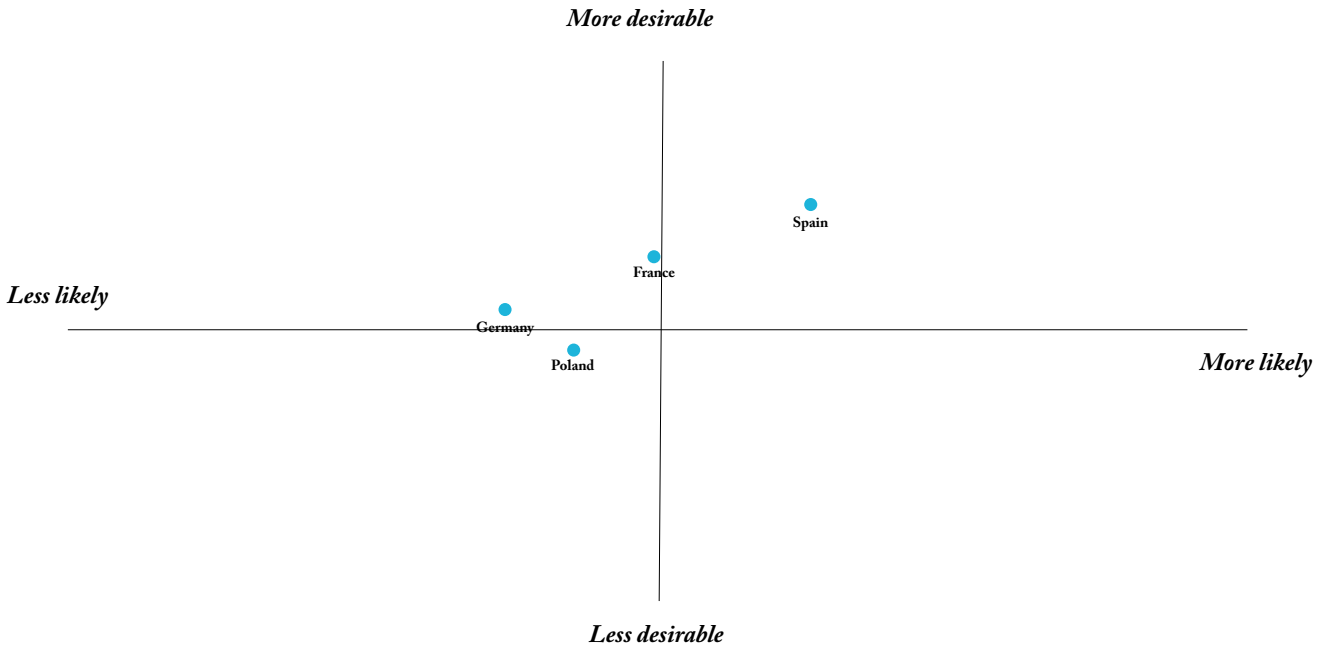


Figure 9. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Many respondents expressed enthusiasm and support for the concept of incentives for sustainable behavior, believing it could motivate greater environmental consciousness. However, a substantial number voiced concerns about increased surveillance and loss of personal integrity, fearing a potential "Big Brother" scenario. Doubts were raised regarding the practical implementation and enforcement of such a system, highlighting uncertainty about its feasibility. There were concerns that the system could exacerbate social inequalities, allowing wealthier individuals easier access to sustainable practices than those with lower incomes. Respondents also debated whether the system should reward positive actions or punish negative ones, with many favoring a rewarding rather than punitive approach.



RADICAL CIRCULARITY

Imagine that in 2035 there are strict requirements for reuse, recycling and product durability. With at least half of all raw materials for new products required by law to be reused or recycled, companies have an incentive to recover all waste, and waste management has become an extremely valuable industry. The lifespan of products has also become extremely important. Most products have a 10-year warranty and if they break prematurely, consumers can get their money back.

In this scenario, we operate under the assumption that a paradigm shift has occurred in the way we approach resource management and product design. Stricter government regulations have driven companies to compete on the basis of circularity. Many are heavily investing in developing innovative circular business models and closed-loop sourcing systems. They now view every product at the end of its life not as waste, but as both a valuable resource to be recovered and as a legal liability that needs to be reintegrated into the manufacturing process. By setting high product durability standards as norm, consumer expectations are also increasing.

THE RESULTS IN BRIEF

Radical circularity is the most desirable scenario across all surveyed countries. It enjoys very strong support in Germany, France, Spain, and Poland. It also ranks higher than other scenarios in perceived feasibility, particularly in Spain and Poland. Very few respondents find the scenario repulsive or extremely unlikely, indicating a broad and shared sense of approval.

KEY COUNTRY DIFFERENCES

Germany reports the highest desirability overall, with France and Spain close behind. Spain stands out for its high belief in the scenario's likelihood. Poland and Germany show some reservations around feasibility but remain overwhelmingly positive overall. All countries reflect strong consensus around the appeal of circularity.

INDIVIDUAL RESPONSBILITY

A strong majority in all countries feel empowered to contribute to realizing this scenario. Spain (81%) and France (71%) report the highest levels of individual agency, followed by Poland (61%) and Germany (48%). Few respondents across the board believe they cannot influence this outcome.

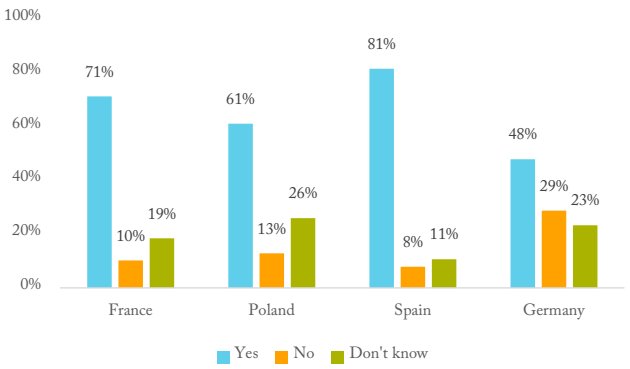


Figure 10. Share of those who found the scenario desirable and also believe they can contribute to its development.

Hopeful future

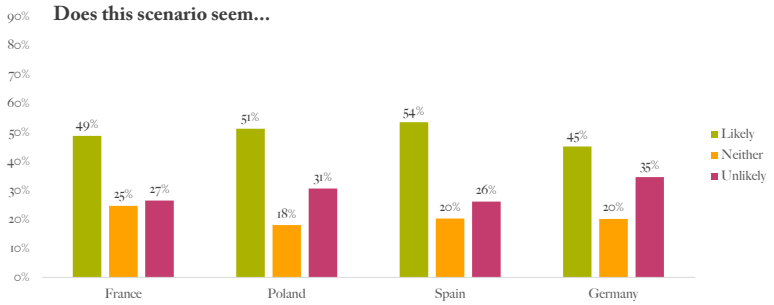


Figure 11. Proportion of the population in each country perceiving the scenario as likely/unlikely.

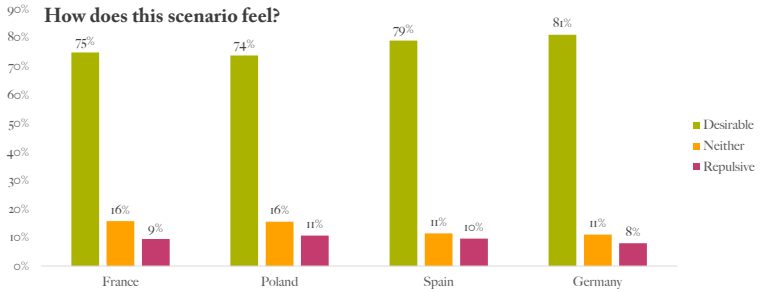
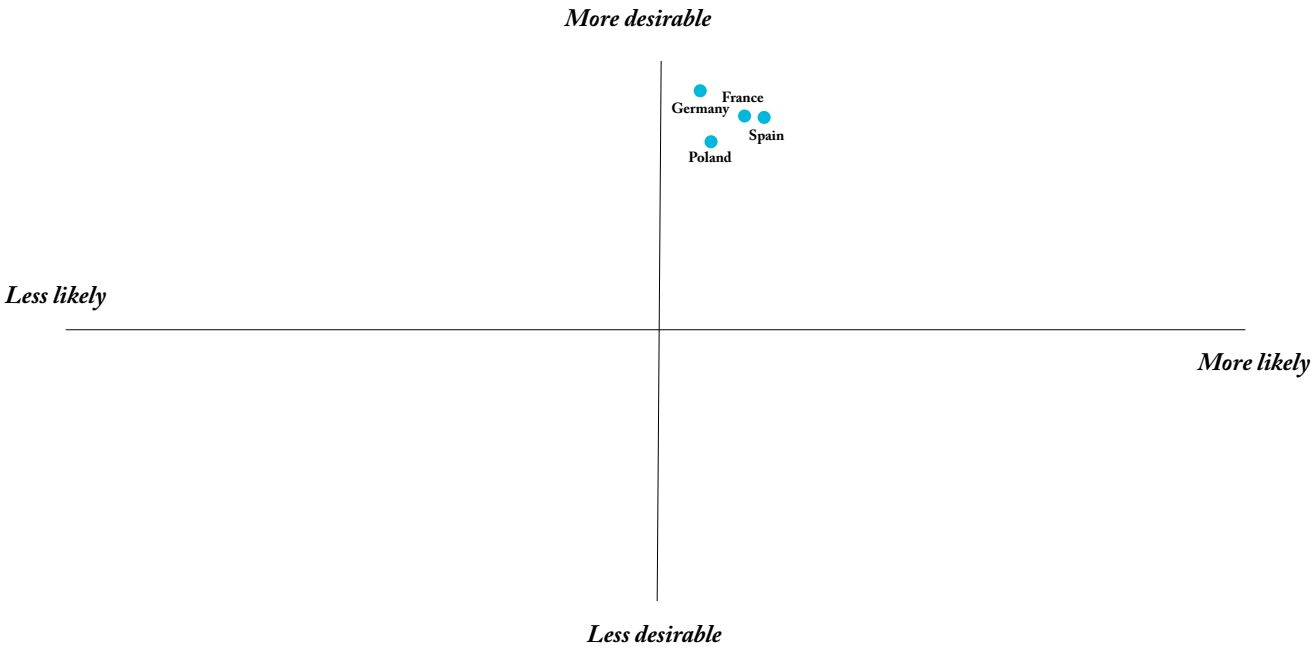


Figure 12. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Many respondents expressed strong support for sustainability and the idea that products should last longer. There was widespread agreement that this scenario would benefit both the environment and consumers. However, some were skeptical about how feasible it would be to implement, citing the need for significant changes in both production practices and consumer behavior. Concerns were also raised about economic implications, including potentially higher product prices and industry resistance. Nonetheless, many voiced a strong desire for transformation and viewed the scenario as a crucial step toward a more sustainable future.



CATASTROPHE-DRIVEN CONSCIOUSNESS

Imagine that by 2035 there have been so many environmental disasters around the world that sustainability has become the most important political issue worldwide. Governments and states are working together to defeat climate change in the same way that they agreed to tackle the COVID-19 emergency in 2020. Climate change has risen to the top of the agenda and other issues are lower priorities in both national and international politics.

This scenario was born out of the mindset that prevailed during the Covid-19 pandemic: a clear reshuffling of national and international priorities combined with strict measures to minimize social and economic damage while tackling the urgent issue.

In today's world, where we find ourselves grappling with multiple crises simultaneously – the so-called metacrisis – our collective attention often resembles the fragmented focus experienced in the digital age. We struggle to concentrate on a single issue, constantly bombarded by a myriad of pressing concerns. It raises the question: will it take a catastrophe to jolt us into a state of unified action? In Kim Stanley Robinson's acclaimed climate-fiction novel "The Ministry for the Future," a devastating climate disaster serves as the catalyst for a global realignment of society's priorities - *perhaps a possible future.*

THE RESULTS IN BRIEF

Spain shows the most support for this scenario. France also leans positive. Germany and Poland are more critical. Germany also reports a relatively high share of respondents finding the scenario very repulsive.

KEY COUNTRY DIFFERENCES

Spain stands out as the most supportive of a coordinated, emergency-style global climate response. France reflects a mixed but generally favorable view, while Germany and Poland show stronger resistance and doubt about both desirability and feasibility.

INDIVIDUAL RESPONSBILITY

Respondents in Spain feel the most empowered, with 71% saying they can help bring about this scenario. France (57%) and Poland (53%) also show solid belief in individual influence. Germany is more divided, with 38% feeling they can contribute and 37% saying they cannot.

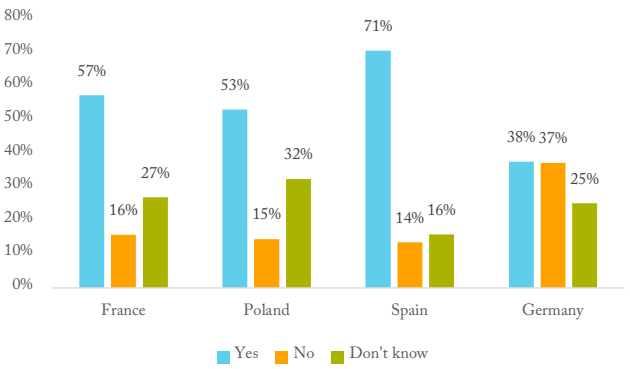


Figure 13. Share of those who found the scenario desirable and also believe they can contribute to its development.

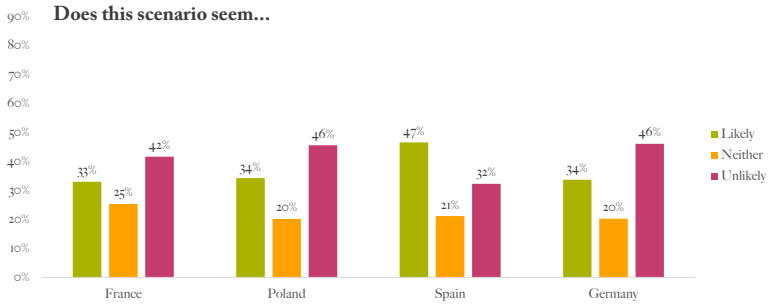


Figure 14. Proportion of the population in each country perceiving the scenario as likely/unlikely.

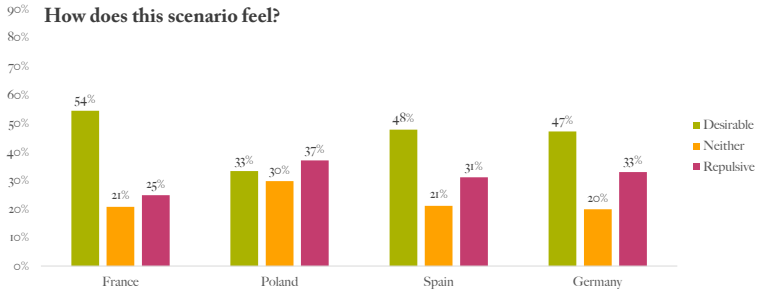
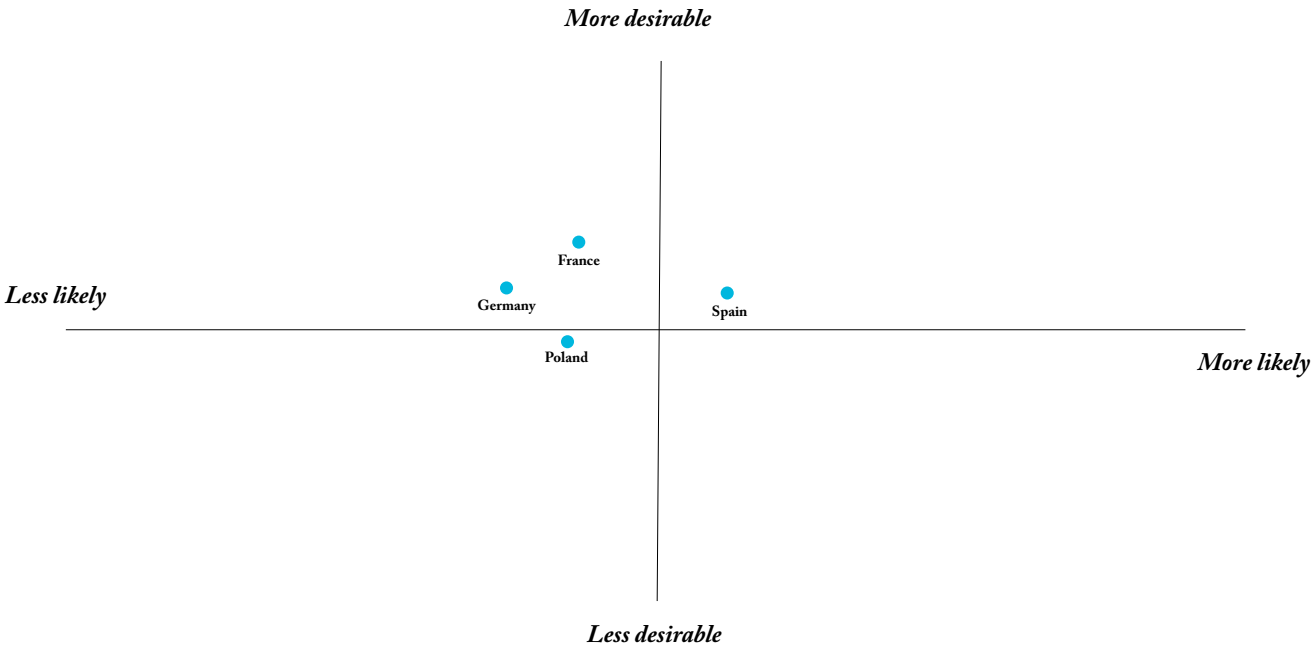


Figure 15. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Many respondents highlight the importance of global cooperation to tackle climate change but are sceptical it can be achieved given national interests, economic pressures, and political division. Several draw parallels to COVID-19 response efforts, expressing concern that similar approaches could lead to authoritarian control or ineffective policy. Some emphasize the need to balance climate action with economic stability, health, and social welfare. A strong sense of urgency emerges across countries—many believe that proactive measures are needed now, rather than waiting for disaster to force action.



POST-GROWTH SUSTAINABILITY

Imagine that in 2035 it will have become a priority to downshift the economy and to consume and produce less. We no longer try to compensate for the fact that we consume so much of the earth's resources, but instead put the emphasis on consuming less. Plans to try to "invent away" the climate crisis have been abandoned, instead there are high taxes on oil and other fossil fuels and harsh penalties for companies that consume too much. Most people consume significantly less and travel less than they do today, and have more time to spend with friends and family.

On the 15th of May 2023, president of the European Commission Ursula von der Leyen took to the stage with introductory remarks at the Beyond Growth conference in Brussels – at the European Parliament nonetheless. It marked an important milestone for the post-growth (and degrowth) movement, and a step closer for emerge of post-growth policies.

This scenario describes a world where practices like carbon or biodiversity compensation are phased-out as their effects are considered to be too long-term for any meaningful effect. The dominating narrative of sustainability through economic growth has faltered, instead leaving place to new metrics that identify new goals. Externalities are now priced it at levels much higher than today and generational futures perspectives are longer. This makes the costs of mass-production much less desirable and business dynamics fundamentally different.

THE RESULTS IN BRIEF

The scenario receives moderate support overall, with the highest levels of desirability in France and Spain. Poland and Germany are more sceptical; Poland shows the highest repulsion rate and Germany views it as very unlikely. Overall, perceived likelihood is low across all countries, particularly in Germany.

KEY COUNTRY DIFFERENCES

France and Spain display a balanced perspective, expressing moderate openness alongside scepticism about implementation. Poland is notably resistant, indicating significant discomfort with the scenario. Germany is distinctly critical, expressing substantial doubts about both the feasibility and desirability of a post-growth approach.

INDIVIDUAL RESPONSIBILITY

Respondents in Spain (71%), France (66%), and Poland (64%) feel strongly that they could contribute to this scenario becoming a reality. Germany is considerably less confident, with only 47% believing in their ability to contribute, alongside substantial uncertainty (22%) and outright scepticism (31%).

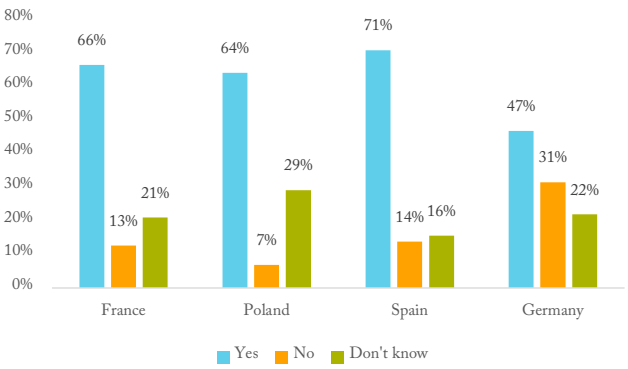


Figure 16. Share of those who found the scenario desirable and also believe they can contribute to its development.

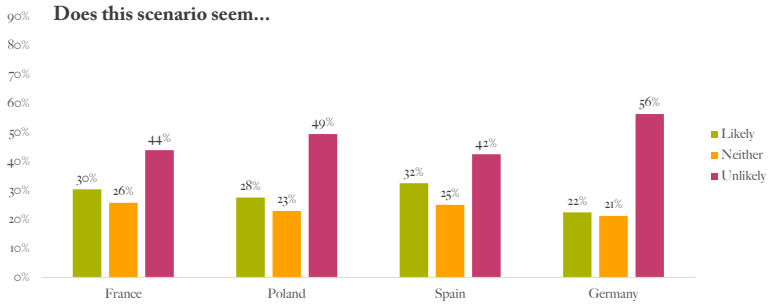


Figure 17. Proportion of the population in each country perceiving the scenario as likely/unlikely.

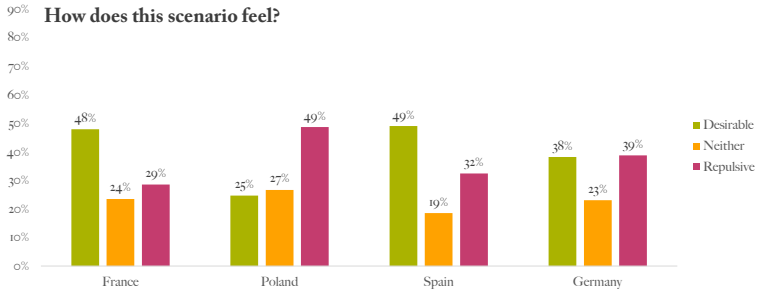
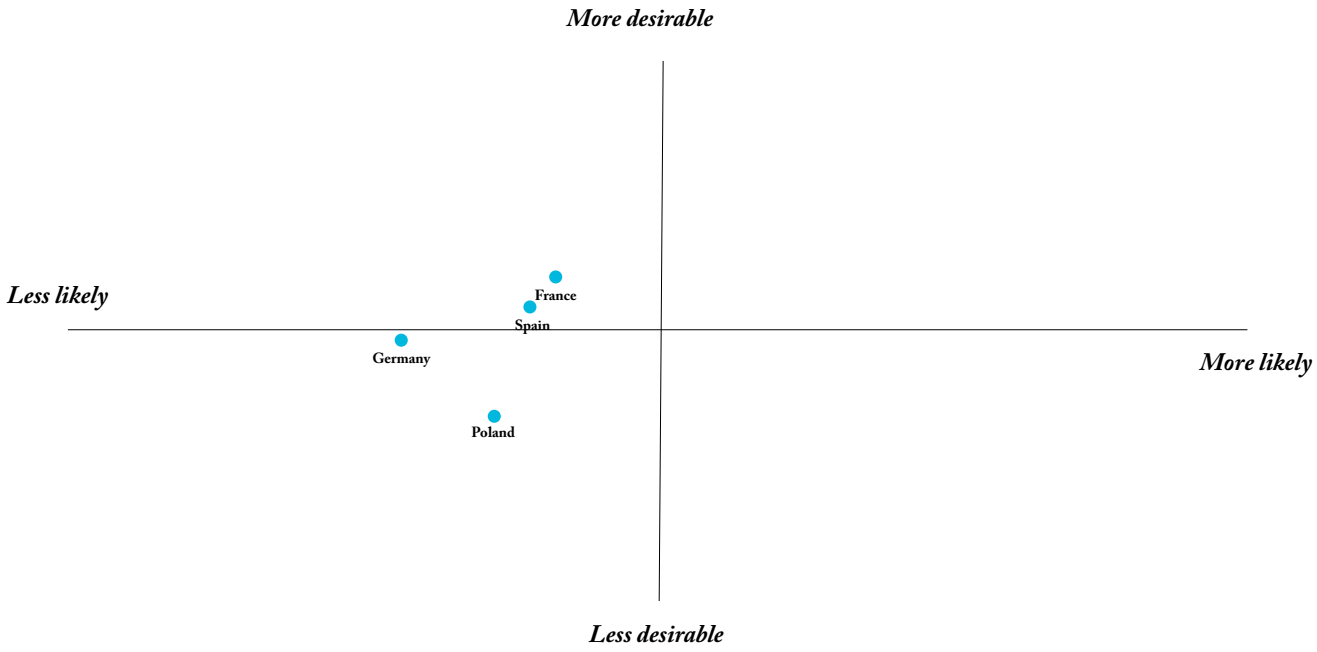


Figure 18. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Respondents generally support the principle of reduced consumption to prioritize sustainability. However, significant concerns about economic impacts, especially job security and livelihoods, are frequently voiced. Many respondents are sceptical about the practicality of achieving this scenario, citing human nature and existing economic frameworks as major obstacles. The need for fairness in implementing reduced consumption is strongly emphasized, highlighting that the burden should be equitably shared, including among wealthier populations. Issues of personal freedom and quality of life also emerge prominently, with some respondents fearing that reduced consumption could lead to substantially lower living standards.



AI-COACHES FOR SUSTAINABILITY

Imagine that in 2035, there are sophisticated AI solutions in your phone that can coach your consumption in real time. For example, it automatically orders the correct amount of groceries to reduce food waste, and so you don't have to think about it further. It chooses gadgets with the best quality and longest lifespan to prevent things from breaking. The AI is also set to choose the most sustainable options for you.

This scenario describes a world in which it is not the consumer's choices that drive sustainable consumption directly – but a coaching AI that simplifies and streamlines the process of shopping sustainably. In such a world, it is easier than ever to understand the carbon emissions, materials usage, and other environmental impacts of any product you buy, but most people never have to. Instead of keeping track of all these factors and making an informed decision, the AI will simply choose sustainably for the consumer. Curious shoppers can still do their own research, but it isn't necessary to become an expert in circularity or carbon-tax policy in order to shop sustainably.

THE RESULTS IN BRIEF

This scenario is one of the most polarizing in the study. While a notable portion of Spaniards view it as very likely, desirability remains generally low across all countries - ranging from 22% in Germany to 44% in Spain. Meanwhile, rejection levels are high: 64% in Germany, 60% in Poland, and 54% in France consider the scenario repulsive. The mixed reception points to deep ambivalence about the role of AI in personal consumption.

KEY COUNTRY DIFFERENCES

Spain is the only country showing a balanced perspective, with relatively high ratings for both likelihood and desirability. France demonstrates some optimism regarding feasibility but still shows low desirability. Poland and Germany are the most sceptical, expressing both high levels of repulsion and significant doubt about whether this scenario is desirable or beneficial.

INDIVIDUAL RESPONSIBILITY

Respondents in Spain (73%) and France (65%) feel confident they could contribute to the development of such a scenario. Poland (51%) and Germany (48%) also show moderate levels of agency, though they are more divided and uncertain, with many respondents unsure or pessimistic about their role.

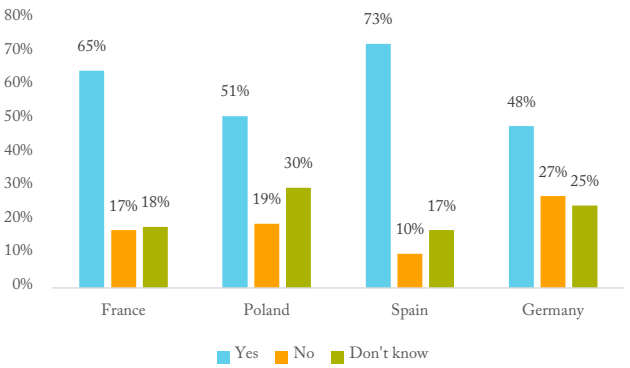


Figure 19. Share of those who found the scenario desirable and also believe they can contribute to its development.

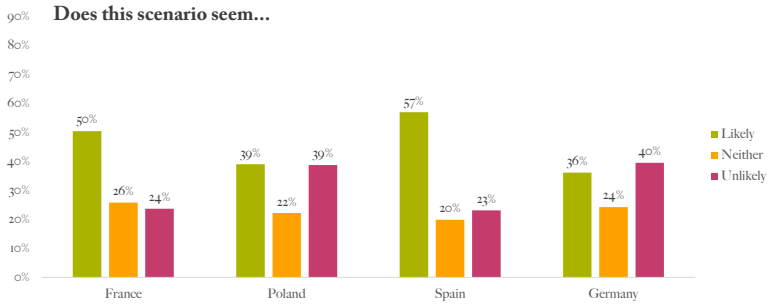


Figure 20. Proportion of the population in each country perceiving the scenario as likely/unlikely.

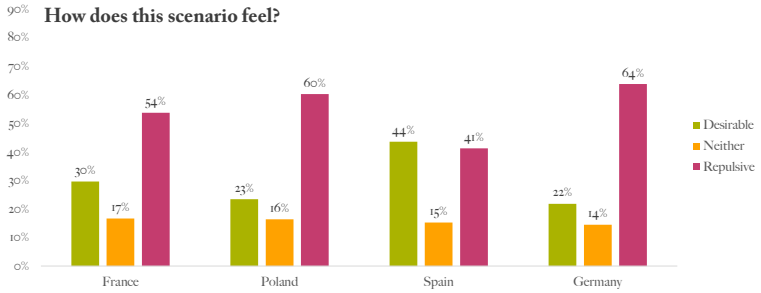
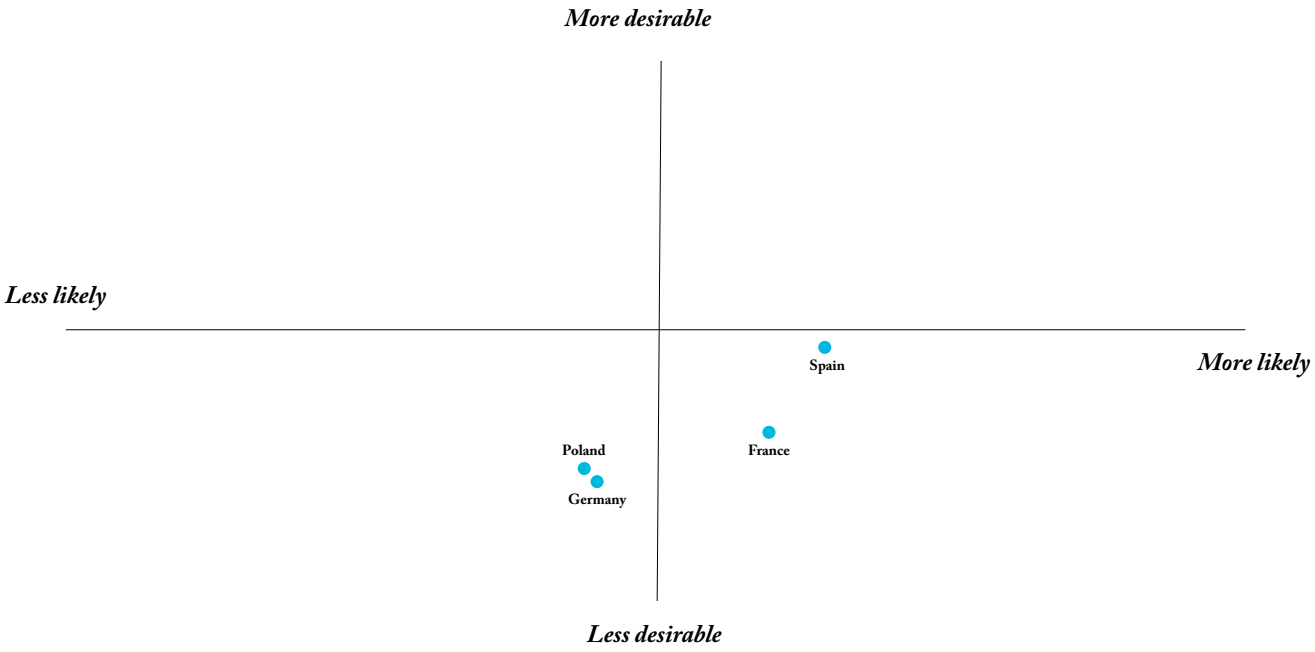


Figure 21. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

The scenario generated strong emotional reactions. Many respondents expressed fear and concern about AI infringing on personal freedom and decision-making. Issues such as privacy, overreliance on technology, and loss of individual autonomy were raised frequently. Some acknowledged the potential for positive impact—particularly in reducing waste and promoting sustainability—but insisted that the final decisions should remain in human hands. A recurring theme was mistrust: respondents doubted whether AI would reflect personal values or preferences, and feared corporate misuse or loss of control. Overall, this scenario is viewed with significant hesitation, blending technical promise with profound social concerns.



PRODUCTION CLOSER TO HOME

Imagine that by 2035 we will have moved much of our manufacturing back to Europe, and that many products will be made close to you. Advanced components are still shipped internationally, but for example, the TV is assembled close to you, and where it is possible to use locally produced components, this is also done. In principle, all products are assembled as close to the consumer as possible at the last stage to reduce transport and supply chain vulnerability. This means that many more Swedes are working with manufacturing, repair and upgrading either in factories or on a small scale in their local area.

Here, respondents were asked to imagine a future of "re-shoring" – manufacturing brought closer to the consumer – combined with more local productions and assembly lines to reduce transport costs and environmental damage. Though closely linked to sustainability, such a scenario also touches on aspects of employment and geopolitical concerns, and as such is a scenario with many possible dimensions to consider. Core to this future is that in 2035, far more products will be made in the same market as the consumer, at least in the last stage. Specialization is still a necessary part of economic activity, but whatever work needs not be heavily specialized is shifted to be done nearer the end user.

THE RESULTS IN BRIEF

This scenario enjoys substantial support across the surveyed countries, especially in France, Germany, and Spain. Poland, while still positive, exhibits noticeably lower enthusiasm. Regarding perceived likelihood, the scenario remains relatively low across all countries, with Spain and France slightly more optimistic than Germany and Poland. Respondents appreciate potential economic and environmental benefits but express scepticism regarding practical implementation.

KEY COUNTRY DIFFERENCES

France, Germany, and Spain show high and comparable levels of desirability, reflecting strong collective support for localized production. Poland's significantly lower desirability indicates unique national concerns or scepticism towards the scenario. Germany shows particular scepticism, with the highest percentage finding the scenario very unlikely to occur.

INDIVIDUAL RESPONSIBILITY

A strong sense of individual responsibility is noted particularly in Spain (67%) and France (59%), where respondents believe they can actively contribute to this future. Poland is moderately optimistic about personal influence (45%), while Germany reports notably lower perceived individual agency (31%) and higher uncertainty (29% "don't know").

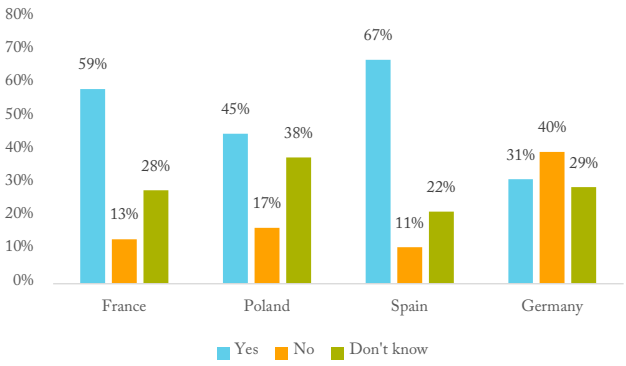


Figure 22. Share of those who found the scenario desirable and also believe they can contribute to its development.

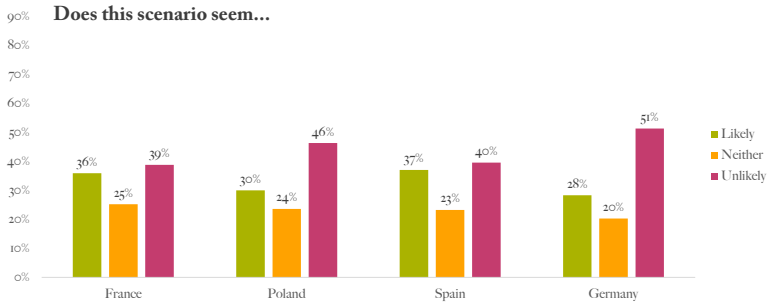


Figure 23. Proportion of the population in each country perceiving the scenario as likely/unlikely.

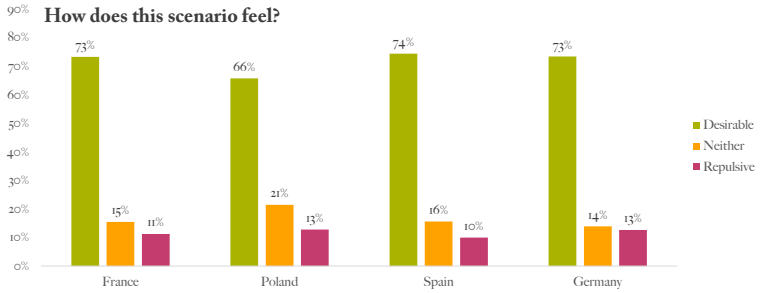
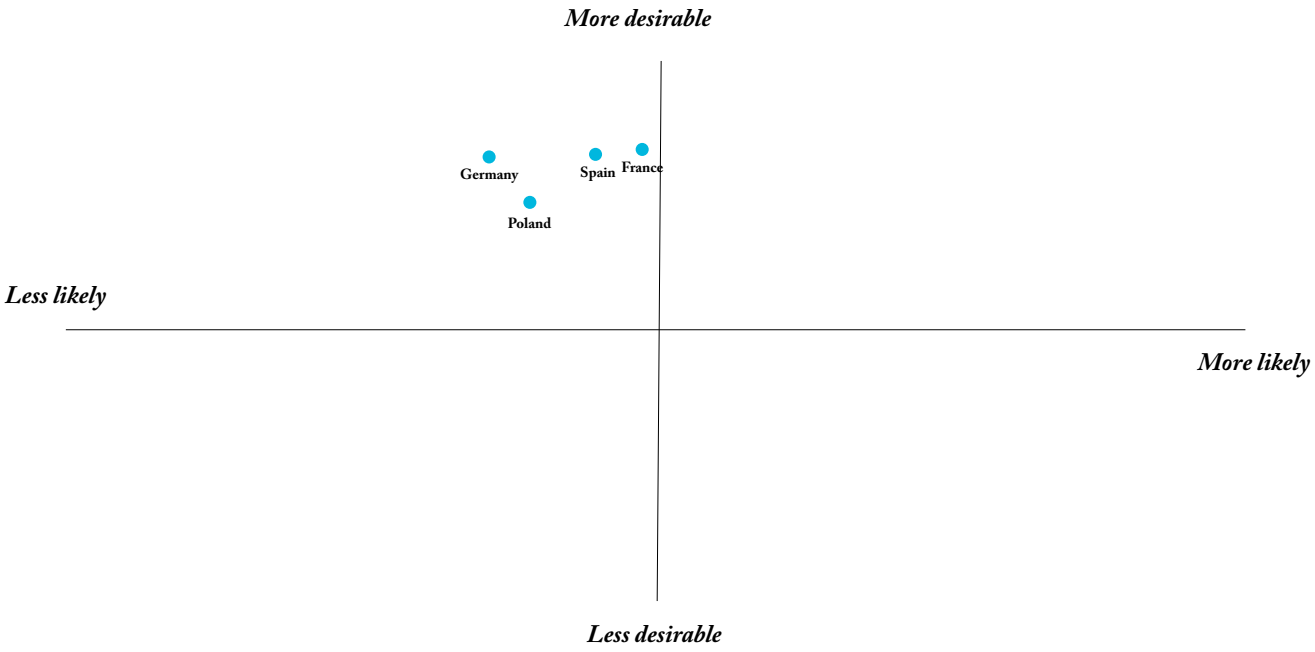


Figure 24. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Respondents widely express enthusiasm for increased local production, highlighting job creation, reduced dependency on imports, and environmental benefits as primary advantages. Concerns were also voiced, predominantly around potential increased costs and higher consumer prices, questioning the feasibility of broad implementation. Many respondents acknowledged significant environmental gains through reduced transportation, along with economic benefits from increased local employment. However, respondents also expressed worries about potential negative social impacts, such as increased noise and industrial presence in residential areas.



NO MORE ADS

Imagine that in 2035 there are strict bans on advertising and marketing. Advertising has not disappeared completely, but it does not occur in public places, not on TV, and not at all to the same extent online – instead, services that were previously financed by advertising have become more expensive, for example, it now costs money to have an account on social media. Advertising is almost completely gone from society, and information about products is handled by platforms that evaluate the goods from both an economic and a sustainability perspective.

This scenario describes a world in which consumption and shopping are no longer primarily guided by advertising, and in which advertisement for products is much more strictly controlled. Cutting down on where ads can be shown and limiting ad slots and ad spaces creates an environment in which advertising as we understand it today occurs far more infrequently, with fines and regulation limiting what can be advertised where. Freemium services driven by advertising are also heavily curtailed and consumers pay for information about products and services rather than being bombarded with information for free, creating a business model for the Internet that does not need to rely on ads to the same extent.

THE RESULTS IN BRIEF

This scenario ranks among the least desirable and least likely of all futures tested. The highest support is found in Spain, while Poland reports the lowest. Perceived likelihood is extremely low everywhere, with Spain (26%) expressing slightly more belief in it being possible. Large segments in every country find the scenario very unlikely and very repulsive.

KEY COUNTRY DIFFERENCES

Spain demonstrates the most open stance toward this scenario, with relatively higher desirability and lower repulsion. Germany is the most dismissive, with both the highest "very unlikely" responses and a strong sense of aversion. France and Poland also show low enthusiasm and strong scepticism toward the feasibility and appeal of this future. Overall, the responses are quite uniform across countries and differences are minor.

INDIVIDUAL RESPONSIBILITY

Respondents in Spain (63%) and France (56%) feel they could personally contribute to making this scenario a reality. Poland is somewhat mixed (48% yes; 27% unsure), and Germany stands out for its pessimism: only 36% feel empowered to contribute, while 44% explicitly believe they cannot.

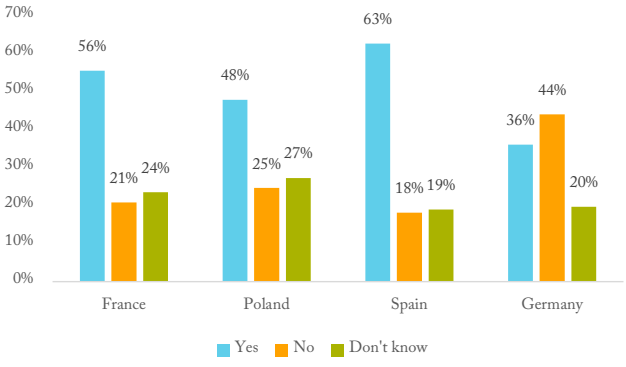


Figure 25. Share of those who found the scenario desirable and also believe they can contribute to its development.

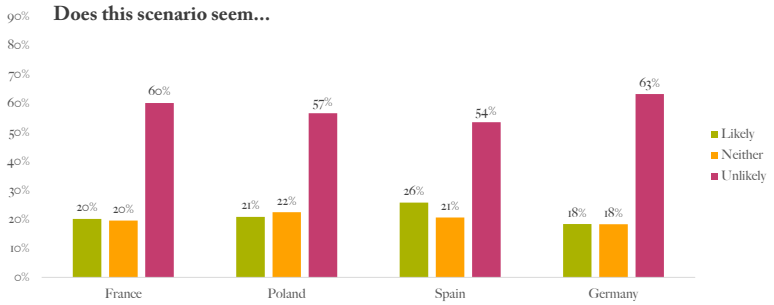


Figure 26. Proportion of the population in each country perceiving the scenario as likely/unlikely.

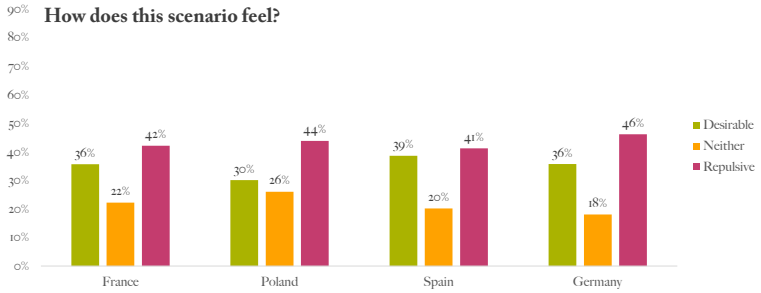
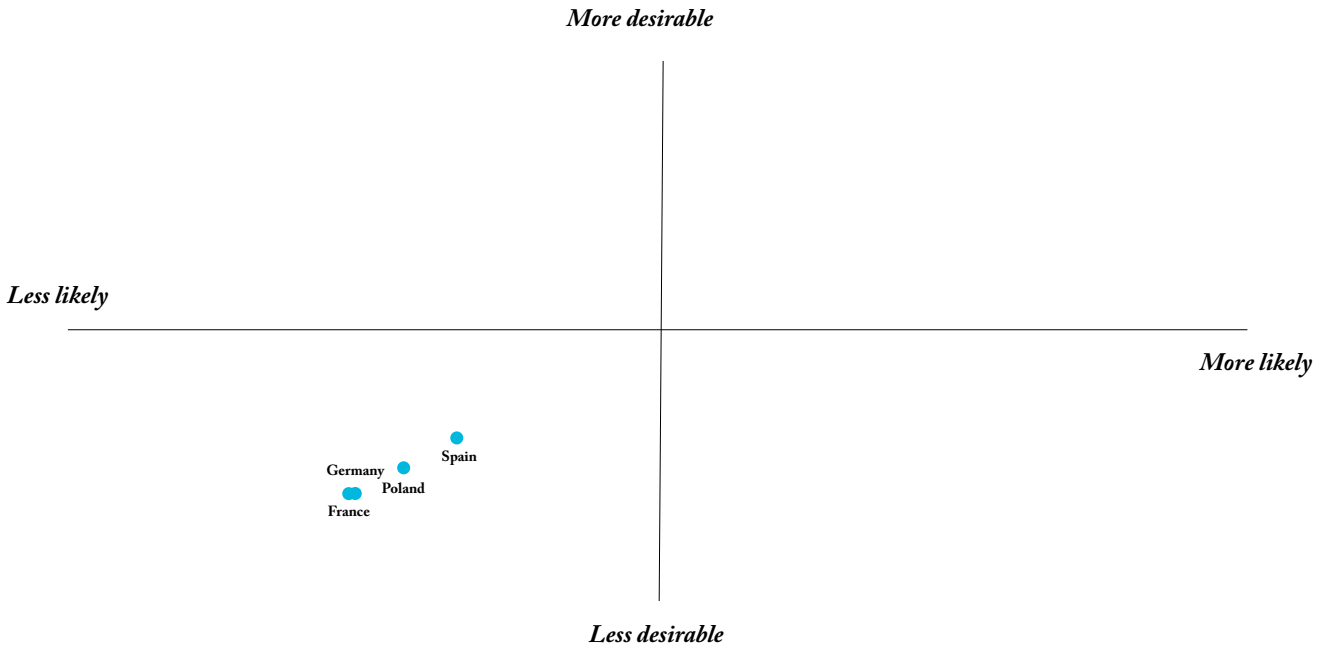


Figure 27. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Many respondents expressed relief at the prospect of reduced advertising, describing current levels as overwhelming and irritating. There is also hope that such a future could foster more conscious and sustainable consumption patterns. However, a key concern is the potential shift in cost burden from advertisers to consumers, particularly for social media and digital services. Opinions are divided on whether people would be willing to pay for ad-free experiences. Respondents also questioned the realism of this future, citing the powerful role of advertising in today's economy and the influence of lobbying. The feasibility of implementing such a transformation on a broad scale remains a major concern.



WE OWN NOTHING

Imagine that by 2035, it has become the norm that basically everything you use is offered through a service provider. You rent or lease car, sports equipment, electronics, and clothes. The result of this is that you own very little and rely entirely on full-service delivery to ensure that your needs are met. The subscriptions always include, among other things, repairs and replacement of faulty products. Everything lasts a long time, and the quality of the rented products is extremely high, which saves money both for you and for the companies that rent them out.

In this world, ownership has been drastically reduced and replaced with services. These business models incentivize making products that last over products that wear out and need replacing, since it is the provider who is responsible for the quality and durability of the products. Hypothetically, then, it might lead to reduced consumption of products and materials without impacting what is available to consumers, especially since such a model also incentivizes sharing items that are used less frequently. The sharing- and subscription model means both that more people can use the same products, and that there is an incentive to make products more durable and higher-quality.

THE RESULTS IN BRIEF

Among the least popular scenarios, this one is met with significant resistance. Across Germany, Poland, and France, a large share of respondents find the scenario very repulsive. Only in Spain does the scenario gain some traction, with more finding it likely than unlikely and desirable over undesirable. Elsewhere, desirability remains low-ranging from 28% in Poland to 31% in Germany.

KEY COUNTRY DIFFERENCES

Spain stands apart with a more favorable view, expressing higher desirability and perceived likelihood. Germany, France and Poland, by contrast, express strong scepticism and aversion, with high levels of rejection and low belief in its feasibility.

INDIVIDUAL RESPONSIBILITY

Despite the lack of enthusiasm, many respondents still feel they could actively contribute to realizing this scenario. Spain (72%) leads, followed by France (64%), Poland (57%), and Germany (49%). However, Germany and Poland also show notable doubt, with higher percentages of respondents unsure or unwilling to support this future.

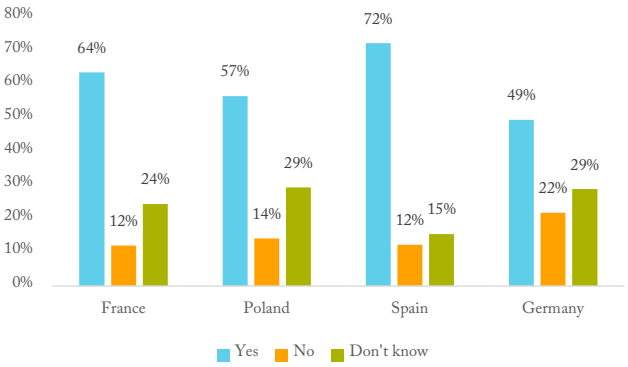


Figure 28. Share of those who found the scenario desirable and also believe they can contribute to its development.

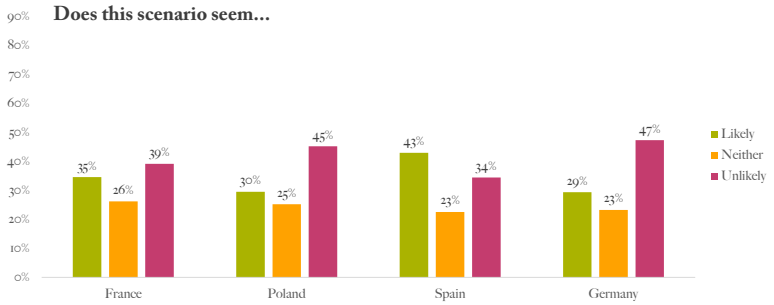


Figure 29. Proportion of the population in each country perceiving the scenario as likely/unlikely.

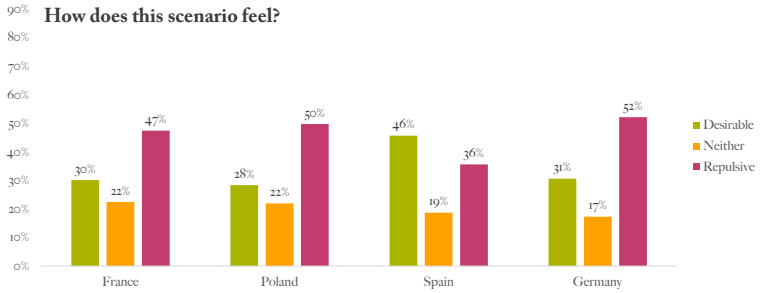
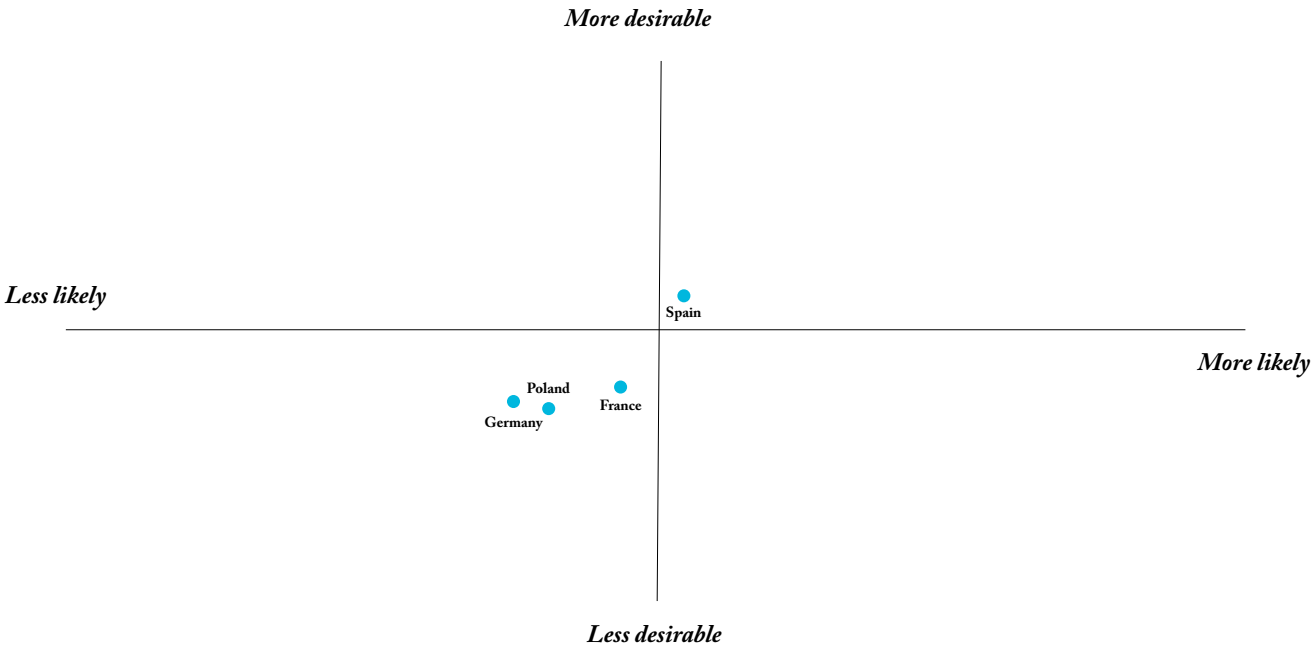


Figure 30. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Strong emotional reactions center on fears of losing independence, autonomy, and personal identity. Many respondents see the absence of ownership as a threat to freedom. Concerns about dependence on service providers, rising costs, and managing constant subscriptions were frequently mentioned. While some recognize environmental benefits—such as waste reduction and extended product life—many question whether the model is economically viable or socially acceptable. A small group sees potential in improved access to high-quality goods and a more sustainable system, but they remain in the minority. Overall, the scenario provokes discomfort and scepticism.



MORE REFERENDUMS

Imagine that in 2035, the environmental issue has been moved from politicians and experts to the people in the form of referendums. The climate initiatives are decided by a majority vote among people in the country, where sufficiently popular initiatives are implemented, and less popular climate plans are voted down. Experts formulate the proposals and are interviewed in the media, but they are not ultimately the ones who decide which plans are put into action or not, but only the popular climate proposals become law.

This scenario imagines a radical democratization of the climate issue, bringing sustainability directly to the voters in the form of climate referendums. In this scenario, all climate directives are decided by the people, though proposals are put forward by various policymakers. Climate policy in such a scenario would be anchored in the "will of the people", though a majority vote is no guarantee a significant minority would not oppose the directive. The scenario is agnostic whether or not other policy areas (outside of sustainability) would be subject to the same rule of referendum.

THE RESULTS IN BRIEF

Perceptions of this scenario are mixed. While Spain and France show moderate levels of support—53% and 51% finding it desirable—others are more cautious. In Germany, 58% view it as very unlikely, with 36% considering it repulsive. Poland follows a similar trend with 52% saying it is very unlikely and 31% finding it very repulsive. Overall, the scenario generates significant scepticism about its practicality and risks.

KEY COUNTRY DIFFERENCES

Spain is most optimistic about this future, balancing desirability and likelihood while maintaining the lowest level of repulsion. Germany stands out as the most negative, with the highest rejection levels. France and Poland remain ambivalent, showing both interest and concern in equal measure.

INDIVIDUAL RESPONSIBILITY

A strong sense of agency is seen in Spain (73%) and France (71%), where large majorities believe they could help make this future a reality. Poland also shows solid engagement (61%), while Germany is more cautious, with only 48% feeling empowered and many unsure or dismissive of their own influence.

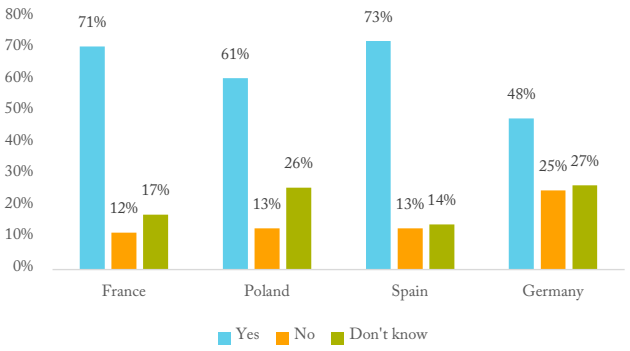


Figure 31. Share of those who found the scenario desirable and also believe they can contribute to its development.

Distant future

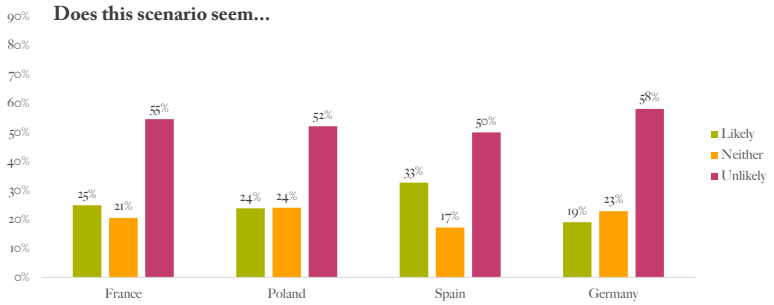


Figure 32. Proportion of the population in each country perceiving the scenario as likely/unlikely.

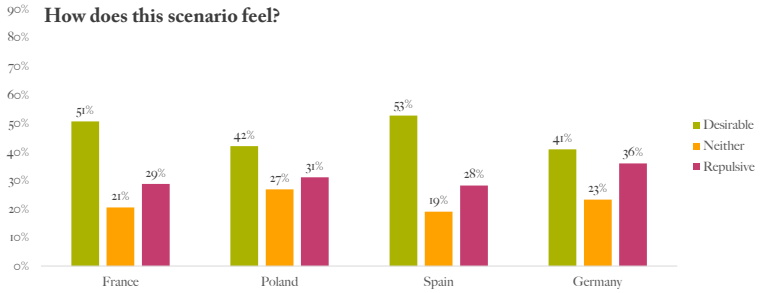
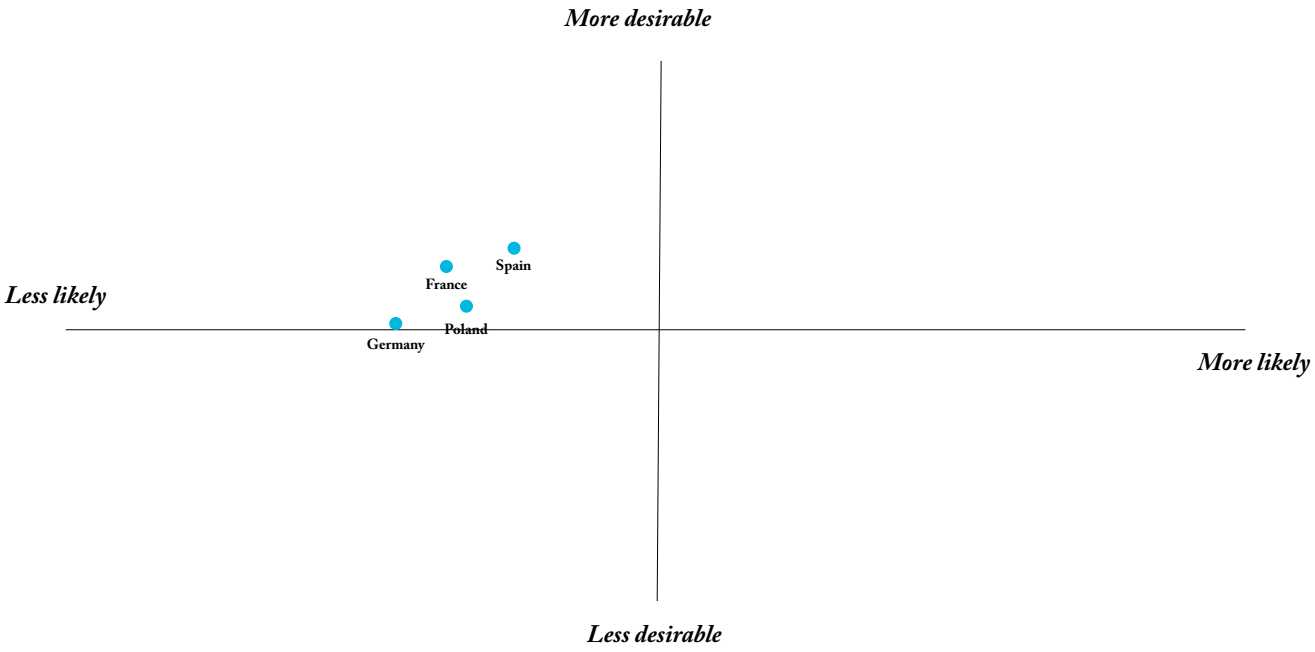


Figure 33. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Respondents highlight the democratic appeal of this scenario, seeing value in giving more power to the people and increasing engagement with climate issues. However, many worry that the general public may not be well-informed enough to make complex decisions on sustainability. Concerns about the susceptibility of referendums to populist influence and media manipulation are widespread. Several respondents call for the inclusion of scientific experts to ensure decisions are based on facts rather than opinion. Others question the feasibility of this approach, noting the risk of division and inefficiency when dealing with the complexity of climate policy.



TECHNOCRATS IN CHARGE

Imagine that in 2035, it will have become the knowledge of experts that forms the basis for most decisions about the climate. Important legislation that is considered to have good expert support does not need to be voted through in the Riksdag, but is adopted automatically, with the requirement to be clearly supported by data and facts. More climate decisions are made by researchers and specially appointed officials, and politicians rarely or never need to be asked about the subject.

This scenario imagines a world of technocratic government in which climate policy is unmoored from the usual political processes and given a speedier path to implementation. Whether or not other important fields would be touched by this transformation is left unsaid, but in such a scenario climate policy becomes a matter that is allowed to sidestep usual democratic processes. A world guided by experts naturally faces questions of the selection process of these experts and technocrats, which is not outlined in the scenario itself and indeed something that troubles many of the respondents.

THE RESULTS IN BRIEF

Public attitudes toward this scenario are mixed. Spain is the clear outlier with 68% finding the scenario desirable and 37% rejecting it strongly. In contrast, Germany is highly sceptical, with 54% finding it very unlikely and 37% very repulsive. France and Poland are evenly split, each rating at similar levels of desirability and likeliness.

KEY DEMOGRAPHIC DIFFERENCES

Spain stands out as the most supportive of this expert-led scenario, both in desirability and feasibility. Germany is clearly the most critical and resistant. France and Poland occupy middle ground, reflecting uncertainty and concern about both outcomes and implementation.

INDIVIDUAL RESPONSIBILITY

Respondents in Spain (61%) and France (58%) feel most confident in their ability to contribute to this scenario. Poland follows with 47%, while Germany is the most sceptical, with only 34% feeling empowered and 37% saying they cannot contribute. A significant share in Germany (29%) also remain undecided.

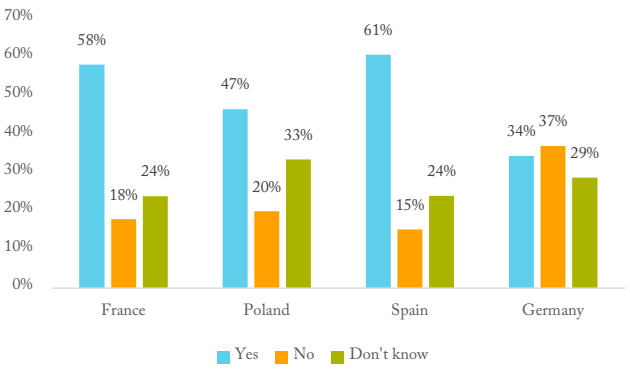


Figure 34. Share of those who found the scenario desirable and also believe they can contribute to its development.

Distant future

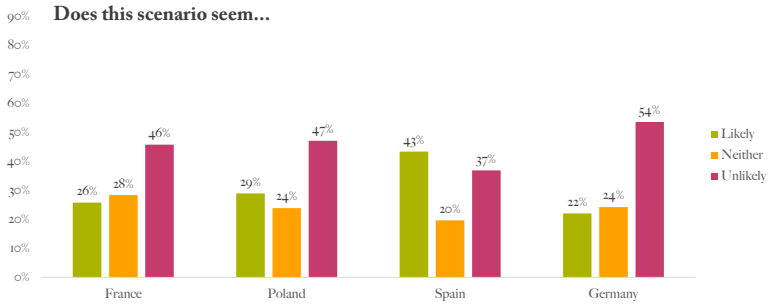


Figure 35. Proportion of the population in each country perceiving the scenario as likely/unlikely.

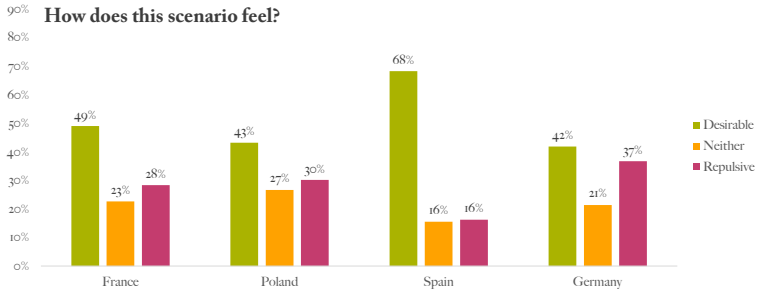
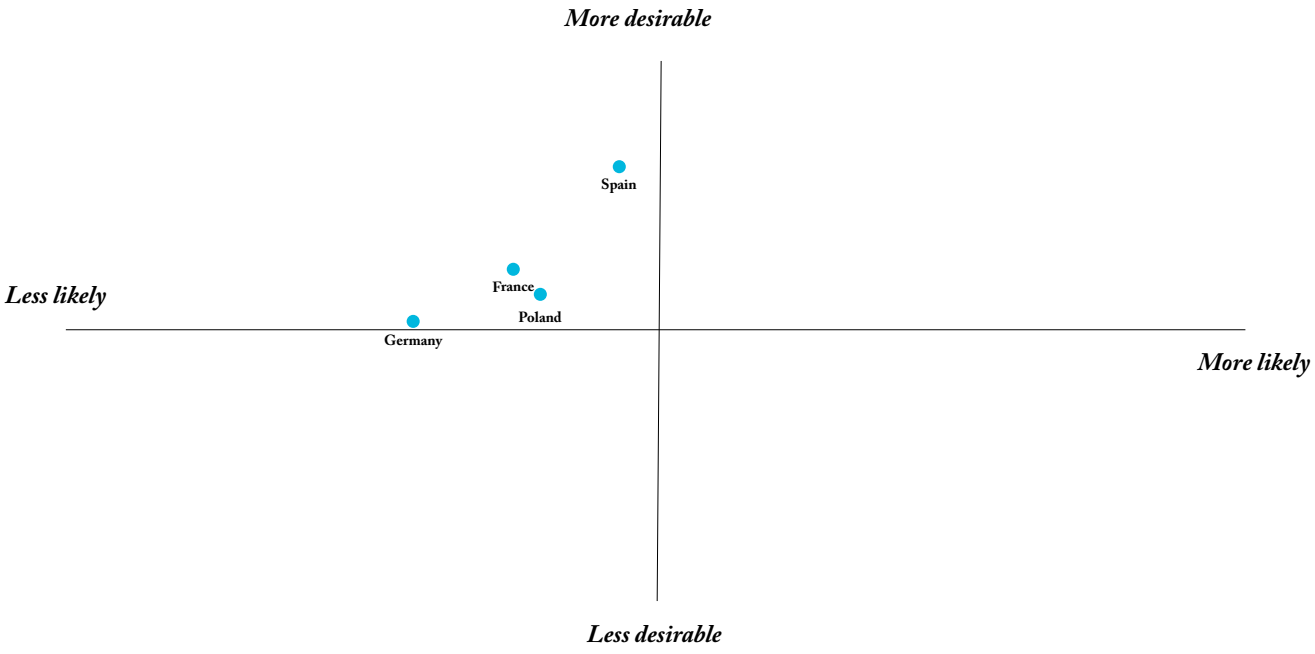


Figure 36. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Many respondents voiced support for the idea of experts taking the lead on climate policy, emphasizing trust in their competence and ability to base decisions on evidence. However, strong concerns were raised around the loss of democratic oversight and accountability. Some fear that technocrats might be influenced by lobbying or financial interests, undermining their neutrality. Others advocate for a hybrid approach, where experts advise and inform but final decisions remain democratic. Practical concerns about implementation within existing political systems were common, highlighting doubts about whether such a scenario could realistically function without deep institutional change.



INNOVATION SOLVES EVERYTHING

Imagine that in 2035, technology has become the focus of solving the climate issue. Governments and companies around the world have shifted their focus towards investing in technology-based solutions such as carbon capture and new materials that require fewer resources. There is no longer a greater focus on consuming less and taking more responsibility in the climate debate, but rather a focus on gearing up innovation and working more with technology-based solutions to climate problems.

This scenario serves as a counterpoint to many other scenarios presented in the survey, in that it emphasizes innovation and technological transformation over societal transformation. In this scenario, technology has become the focus for governments worldwide and massive investments in research and development underpin the answers to the climate crisis. The debate as such has shifted to a policy level occurring far above the heads of most private citizens, much as in the scenario of technocrats in charge.

In this scenario, lifestyles are not heavily affected, though the priorities of society may shift as governments need to invest more money into a green transition, leaving a challenge of resource management for politicians and policymakers.

THE RESULTS IN BRIEF

This scenario receives broad support across countries. Spain stands out with slightly more respondents finding it very desirable and very likely. France, Germany and Poland are similarly positive, with 51-55% in each country rating it very desirable and 38-42% considering it very likely. Repulsion is low across the board, making this one of the most unifying scenarios.

KEY DEMOGRAPHIC DIFFERENCES

Spain is the most optimistic both in terms of desirability and perceived likelihood. France, Germany and Poland follow closely with strong approval. None of the surveyed countries show high levels of resistance to the scenario, indicating a rare cross-national alignment.

INDIVIDUAL RESPONSIBILITY

Respondents in Spain feel most empowered (66%) to contribute to making this scenario a reality, followed by France (56%), Poland (49%), and Germany (40%). Germany also shows higher scepticism, with 33% saying they cannot help and 27% unsure.

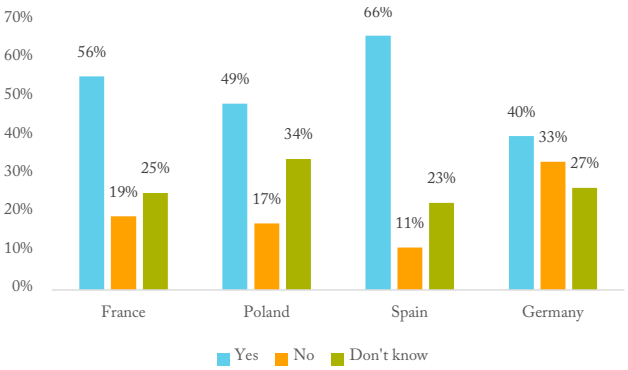


Figure 37. Share of those who found the scenario desirable and also believe they can contribute to its development.

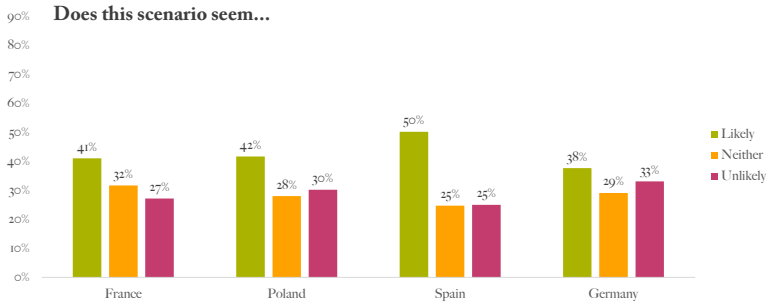


Figure 38. Proportion of the population in each country perceiving the scenario as likely/unlikely.

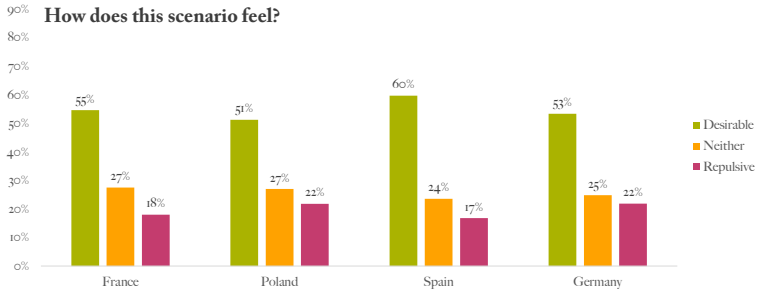


Figure 39. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Many respondents' express optimism about technological innovation as a solution to climate change, seeing it as a way to achieve major progress and reduce environmental impact. Others caution against relying solely on tech, highlighting the importance of behavioral change and reduced consumption. Some worry that technology-driven approaches might increase inequality by favoring wealthy individuals or nations. Across the board, respondents emphasize the urgency of immediate action and favor a balanced approach combining innovation with systemic and behavioral changes.

CLIMATE CONSCIOUSNESS AS LUXURY

Imagine that in 2035 it will be possible to manufacture high-end products that have high quality and low environmental impact. Those who can afford it shop and travel in an environmentally friendly way, which has grown significantly in status. More environmentally friendly alternatives are more expensive but also more desirable and the rich in society boast of their low carbon emissions. High-income earners spend their money on taking care of the planet. For example, billionaires and celebrities now travel by train instead of private jets, and the very richest contribute to climate change almost not at all because they can afford the most sustainable solutions.

This scenario envisions climate consciousness as a luxury, something practiced by the wealthiest members of society. In this future, the transition to a greener economy is spearheaded by the wealthiest who can afford such solutions, paving the way for others to copy their behavior and consumption patterns. Ecological and sustainable products hold a high quality, but are often quite expensive, meaning high income earners become the first to adopt climate neutral lifestyles through a combination of innovation and new societal norms that reward sustainable consumption and views it as linked to status and desirability.

THE RESULTS IN BRIEF

The scenario receives moderate support overall, with the highest levels of desirability in France (48%) and Spain (42%). Poland and Germany are slightly more sceptical; Germany shows the highest repulsion rate (43%) and also rates the scenario as most unlikely (64%). Overall, perceived likelihood is low across all countries.

KEY DEMOGRAPHIC DIFFERENCES

Spain displays a more balanced perspective, expressing moderate openness alongside scepticism about implementation. France tends to be see this as more desirable but rates the scenario as quite unlikely. Poland and Germany are more critical, expressing substantial doubts about both the feasibility and desirability of such a scenario.

INDIVIDUAL RESPONSIBILITY

Respondents in Spain (71%), France (66%), and Poland (64%) feel strongly that they could contribute to this scenario becoming a reality. Germany is considerably less confident, with only 47% believing in their ability to contribute, alongside substantial uncertainty (22%) and outright scepticism (31%).

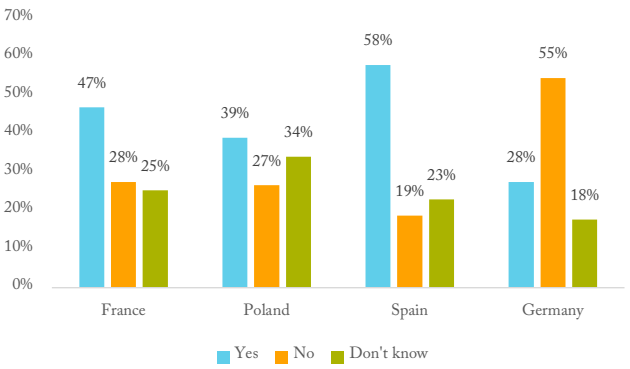


Figure 40. Share of those who found the scenario desirable and also believe they can contribute to its development.

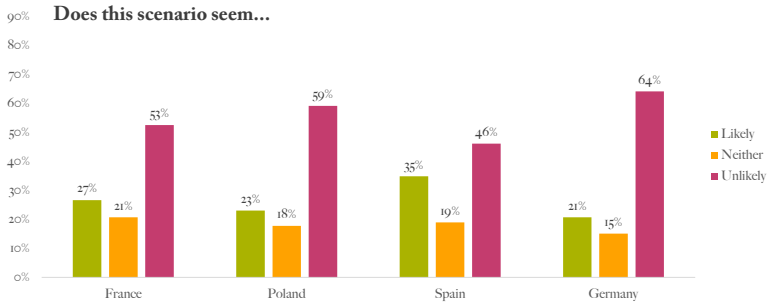


Figure 41. Proportion of the population in each country perceiving the scenario as likely/unlikely.

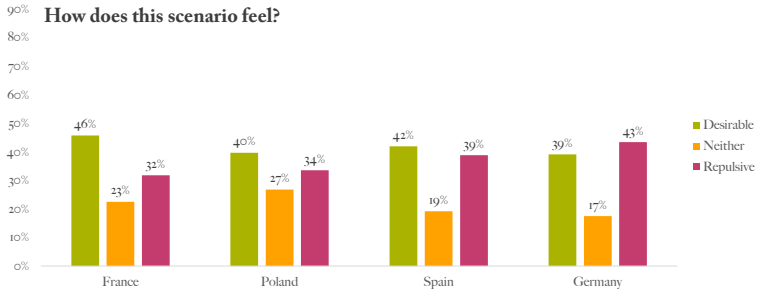
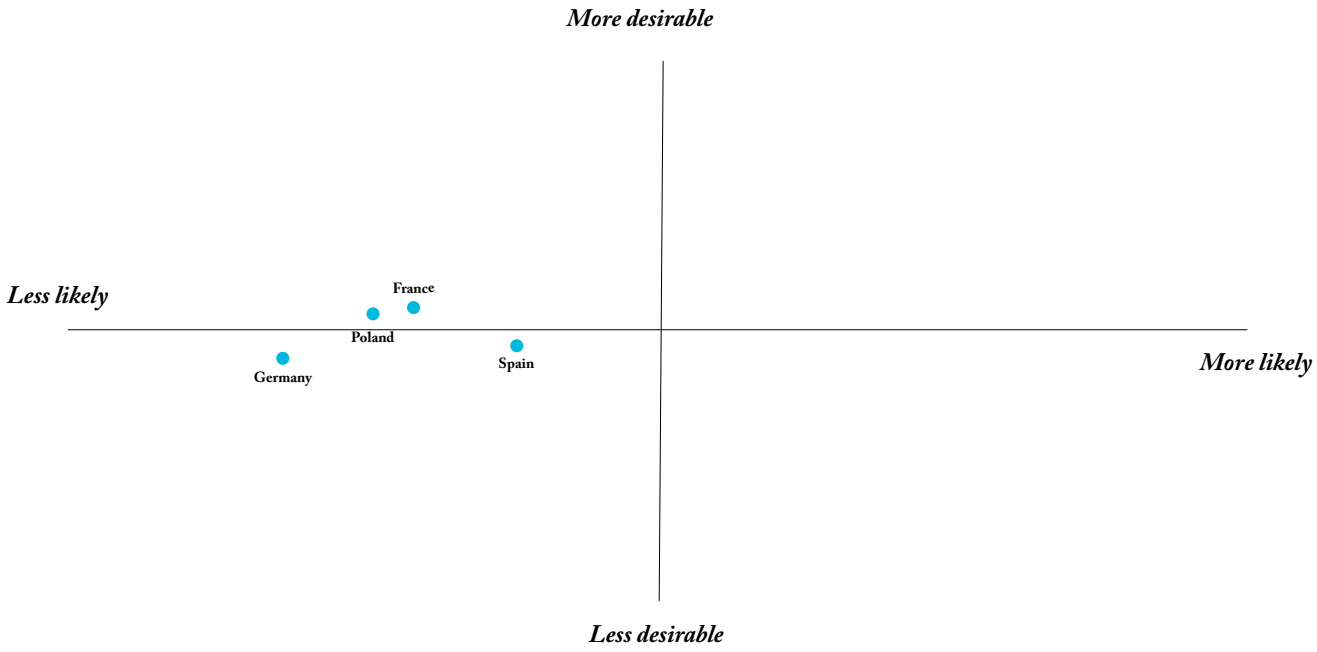


Figure 42. Proportion of the population in each country perceiving the scenario as desirable/repulsive.

SENTIMENT ANALYSIS OF FREE TEXT ANSWERS

Respondents generally support the principle of reduced consumption to prioritize sustainability. However, significant concerns about economic impacts, especially job security and livelihoods, are frequently voiced. Many respondents are sceptical about the practicality of achieving this scenario, citing human nature and existing economic frameworks as major obstacles. The need for fairness in implementing reduced consumption is strongly emphasized, highlighting that the burden should be equitably shared, including among wealthier populations. Issues of personal freedom and quality of life also emerge prominently, with some respondents fearing that reduced consumption could lead to substantially lower living standards.



CONCLUSIONS

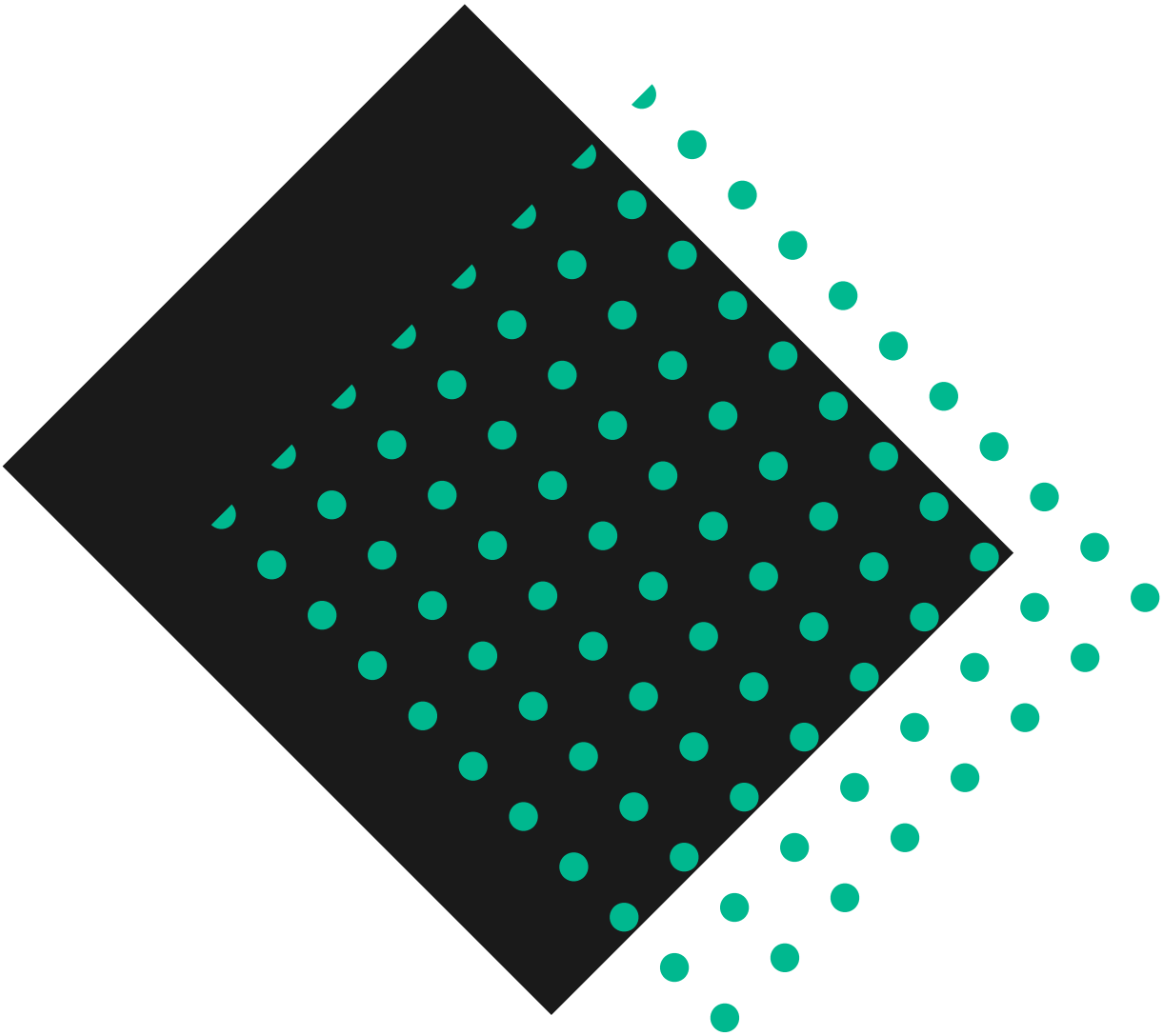
Across the surveyed countries, there is a strong willingness to engage with future-oriented thinking and contribute to sustainable change. Respondents generally find it easier to support developments that enable progress rather than oppose those that restrict it. This is reflected in the widespread support for incentive-based approaches over prohibitive measures.

The scenario on radical circularity stands out as the most desirable across all countries, highlighting a clear preference for sustainability, durability, and responsible consumption. Equity also emerges as a key theme throughout: respondents consistently stress the importance of fair distribution of costs and benefits - particularly in scenarios that involve reduced consumption or restrictions on access.

Ownership is perceived as important for independence and stability, and scenarios that threaten this tend to provoke resistance. Similarly, there is noticeable skepticism towards surveillance and AI-driven interventions, particularly those that may infringe on personal freedom.

Interestingly, advertising is not as widely rejected as expected - many appear to accept it as a trade-off to avoid higher costs elsewhere. Responses often show thoughtful reasoning and a systemic perspective, recognizing the complexity of balancing environmental, social, and economic dimensions.

Finally, the scenarios clearly engage people: many are eager to share their views, raising both hopes and concerns. The diversity and depth of these responses demonstrate the public's readiness to think critically and constructively about the pathways to a sustainable future.



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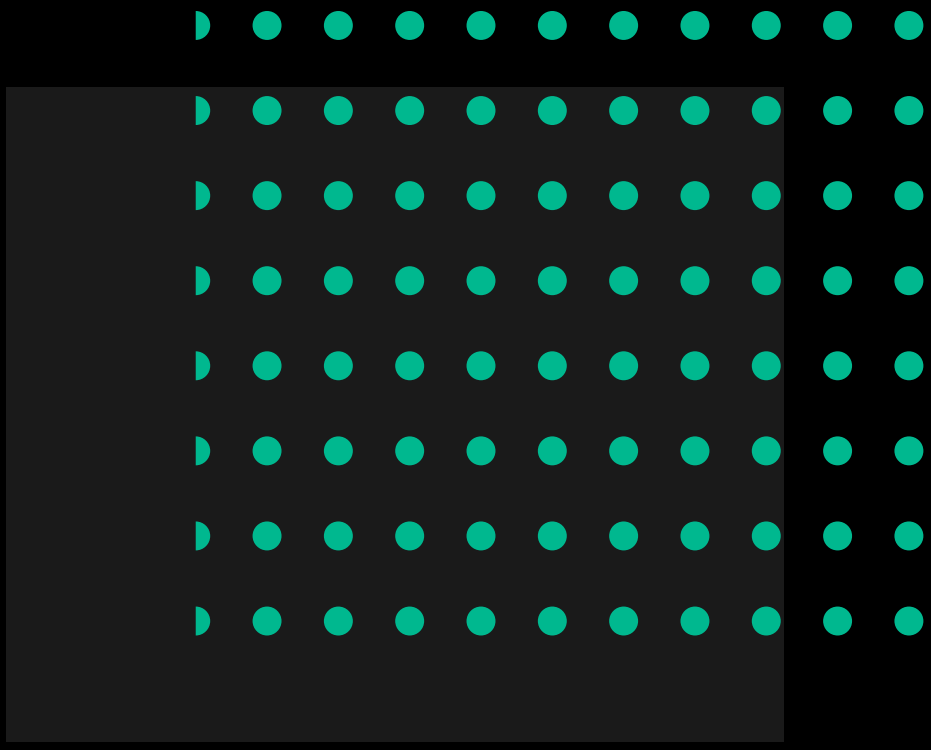
REPORT LAYOUT

Kairos Future

Shapes and style on front page: Freepik

Science Park Borås and Kairos Future hope that this report can become one of the tools for (re)shaping the future.

Futures that today seem far-fetched, are evidently not as far away as we might think. The world has changed immensenly during the past two generations and will probably do so for the two next ones as well. Having the visions are what will lead us in the right direction.



KAIROS FUTURE

Kairos Future is an international consulting and research company that helps companies understand and shape their future. Through trend analysis, innovation, strategy, and software support for AI-driven analytics, we help our clients turn big picture insights into concrete action. Founded in 1993, Kairos Future is headquartered in Stockholm and has offices and partners around the world.

SCIENCE PARK BORÅS
FROM IDEA TO SUSTAINABLE IMPACT

Science Park Borås is an innovation environment where ideas become reality. It operates internationally, nationally and regionally with textiles and fashion, social development and sustainable consumption. Collaboration between companies, academia, public and non-profit actors provides strength in the work with circular business models where design, materials longevity and sustainable materials circulation are central. Science Park Borås at the University of Borås supports companies in textiles and fashion on behalf of the Swedish government and is also funded by the EU, Vinnova and the Västragötaland Region, among others.

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FROM IDEA TO SUSTAINABLE IMPACT

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