



February 2026

Reframing Philanthropy

Making aid and climate messaging fit for 2026



Presentation structure

-
- 01 Summary
 - 02 What's gone wrong?
 - 03 How to fix it: ODA study
 - 04 Latest public opinion
 - 05 How to fix it, part two: Climate study
-



Summary

Reframing Philanthropy



Summary

- Support for action on climate change and overseas aid is **at risk** – both with the public and governments of major western economies.
- Aid and climate action sit on a bedrock of good will with broad public support *in principle*, but a convergence of factors including **zero-sum thinking**, a growing **distrust of elites**, political **polarisation** of electorates, and the increased **covariance of divisive issues** are causing support to crumble in practice.
- Through case studies on both overseas aid and climate action, we have identified ways in which **messaging and framing** of the concept can mitigate some structural issues and begin to re-establish a firm base of support.



Segmenting the public

Who we surveyed



The six ideological groups of the western world

We segmented the public into six groups based on responses to a broad set of questions. These covered traditional ideological topics – such as support for the death penalty, trade unions, feminism, and multiculturalism – as well as emerging areas like attitudes towards artificial intelligence, zero-sum thinking, social trust, and belief in conspiracy theories.

These segments are essential to understanding the current ideological landscape and how philanthropy can adapt accordingly.



Authoritarian Populists

14%



Progressive Internationalists

10%



Distrustful Left

17%



Techno-Optimists

10%



Civic Centrists

31%



Community Conservatives

18%



Authoritarian Populists

- Strongly **socially conservative** – high support for death penalty and heavy opposition to BLM, feminism and multiculturalism.
- More **mixed on economics**: support private enterprise but tend not to think ordinary people get their fair share.
- Most **nationalistic** group: very high support for national loyalty and patriotism over international co-operation.
- **Low levels of social trust** and **very high conspiracism**. Prominent belief that mainstream media / experts / scientists will hide the truth from the public.
- Among the most **‘zero-sum’** groups, with many holding the view that people/countries can only get rich at others’ expense.

Demographics

More likely to be



Radical Right supporter



Aged 55+

GB British



Male

More unlikely to be



Centre-left supporter



Aged 18-34



Female

DE German



Progressive Internationalists

- Basically the polar opposite of the Authoritarian Populists segment.
- Very **socially liberal**, with high levels of support for feminism, trans rights and multiculturalism.
- Also strongly **left-wing on economics**, with high trade-union favourability.
- Score highly on **internationalism** and many see themselves as global citizens.
- **Very collaborative**, with low levels of zero-sum thinking and fairly high levels of social trust.
- Lean **low on conspiracism** but not completely immune, particularly around the role of the media and political power structures.

Demographics

More likely to be



Radical Left supporter



Aged 18-34

us American



Female

More unlikely to be



Radical Right supporter



Aged 55+



Male



High income



Distrustful Left

- Close to what we might call the 'old left'.
- Hold similar **economic left-wing** views to Progressive Internationalists, but possess more **moderate views on social issues**. They tend to lean conservative on law and order.
- Feel like they have been **left behind** by the modern age, and as a result are **heavily zero-sum**, have very **low levels of social trust**, and are fairly **conspiracist** in their mindset.
- Hold middle-of-the-road views on nationalism.

Demographics

More likely to be

FR French



Non-voter



Aged 55+



No degree

More unlikely to be



High income



Aged 18-34



Centre-left supporter



Degree holder



Techno-optimists

- **Socially liberal**, behind only Progressive Internationalists in terms of liberalism.
- **Support social movements** like BLM and feminism, but hold lower opposition to traditional values.
- **Moderate views on economics.**
- Most distinguishable by their **low levels of zero-sum** beliefs, and widespread **rejection of conspiracist thinking**.
- Fairly high levels of social trust.
- Can be characterised as **‘futurists’**, showing the highest levels of support for new technologies like AI, and warmth towards climate-focused movements like Net Zero and veganism.

Demographics

More likely to be



Centre-left supporter

DE German



Degree holder



High income

More unlikely to be



Radical Right supporter

GB British



No degree



Age 35-54



Segment summaries




Civic Centrists

- Hold **moderate views** across the board, representing the 30% of the public who sit 'in the middle' on a lot of issues.
- Marginally right-of-centre on economics.
- **Lean low on conspiracism**, particularly rejecting the idea that the mainstream media / experts hide the truth from the public.
- Ranks third out of the six groups in terms of social trust.

Demographics

More likely to be

 Centre-right supporter

 High income

 Aged 18-34


us American

More unlikely to be

 Radical Right supporter

 Aged 55+

FR French

 Low income



Community Conservatives

- **Lean socially conservative**, with opposition to concepts like feminism and trans rights.
- The most **economically right-wing** group, with belief in private enterprise and opposition to trade unions.
- Broadly switched off from politics and tend to **distrust and oppose national institutions** or concepts like patriotism and nationalism.
- Has higher levels of **social trust** in individuals and their local community.

Demographics

More likely to be



Non-voter



Aged 18-34



High income

us American

More unlikely to be



Aged 55+



Middle income



Radical Left supporter

DE German



Segment comparison

Area	Authoritarian Populists	Progressive Intls.	Distrustful Left	Techno Optimists	Civic Centrists	Community Conservatives
Social conservatism	V high	V low	Mid	V low	Mid	Mid
Economic leftism	Mid	V high	V high	Mid	Mid	Low
Nationalism	V high	V low	Mid	Low	Mid	Mid
Social trust	Low	Mid	V low	High	Mid	High
Conspiracism	High	Mid	High	V low	Low	High
Futurism (AI, climate, veganism)	V low	V high	Mid	V high	Mid	Low
Zero-sum thinking	High	Mid	High	Low	Mid	Mid



What's gone wrong?

Making sense of the challenges

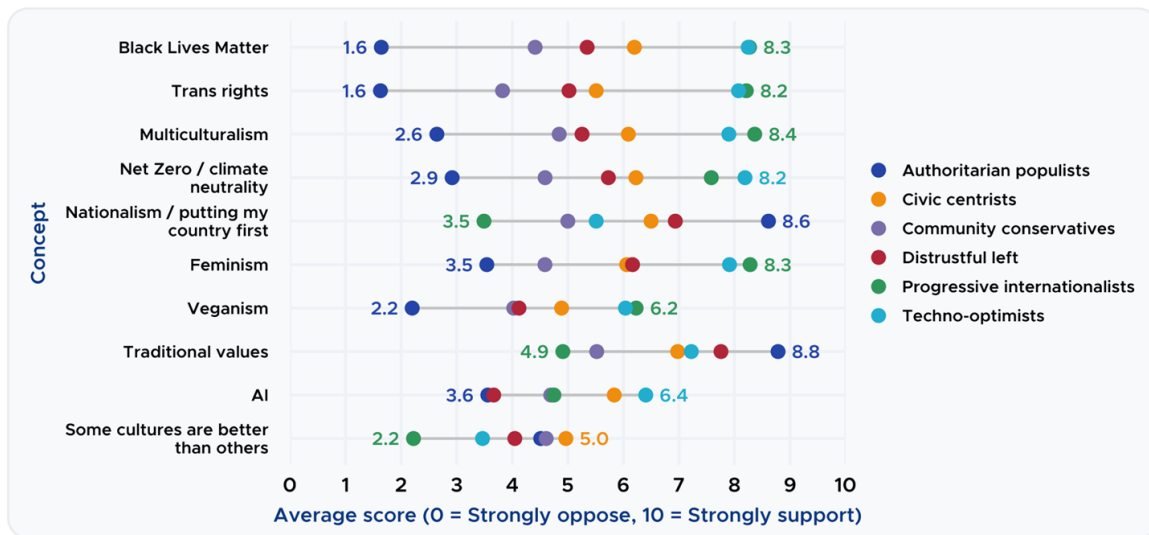
Key issues have become more politically divisive

Net Zero, for example, has quietly become a politically divisive 'culture war' issue, with a greater variance in support by group than concepts like feminism and nationalism.



Net Zero falls into the upper tier of divisive issues

10 CONCEPTS, ORDERED BY IDEOLOGICAL DIVISIVENESS

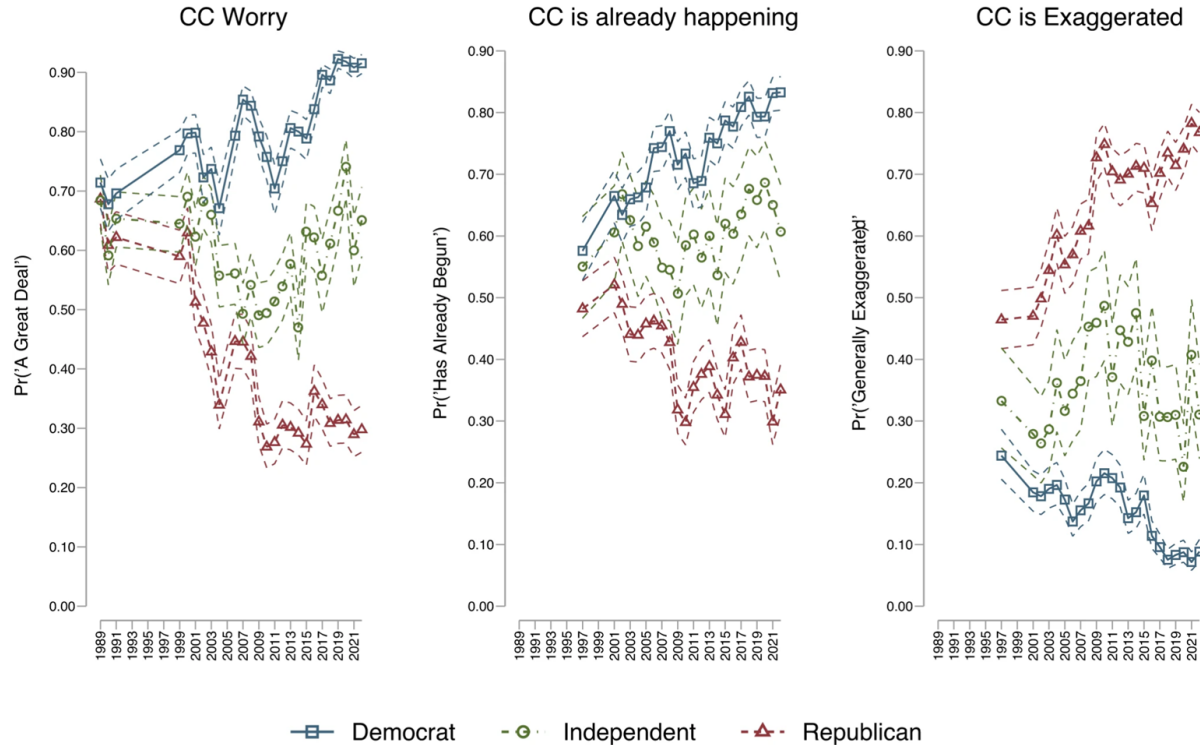


Fieldwork conducted 3-16 June 2025, with a sample size of 3,225 respondents across the UK, US, France and Germany. Data weighted by age, gender, region, education, past vote, political interest levels and ethnicity (UK/US only). Question: "On a scale of 0 to 10, how do you feel about the following concepts or ideas?"



Key issues have become more politically divisive

This tracks with the polarisation of climate change beliefs in the US (1989 to 2021)

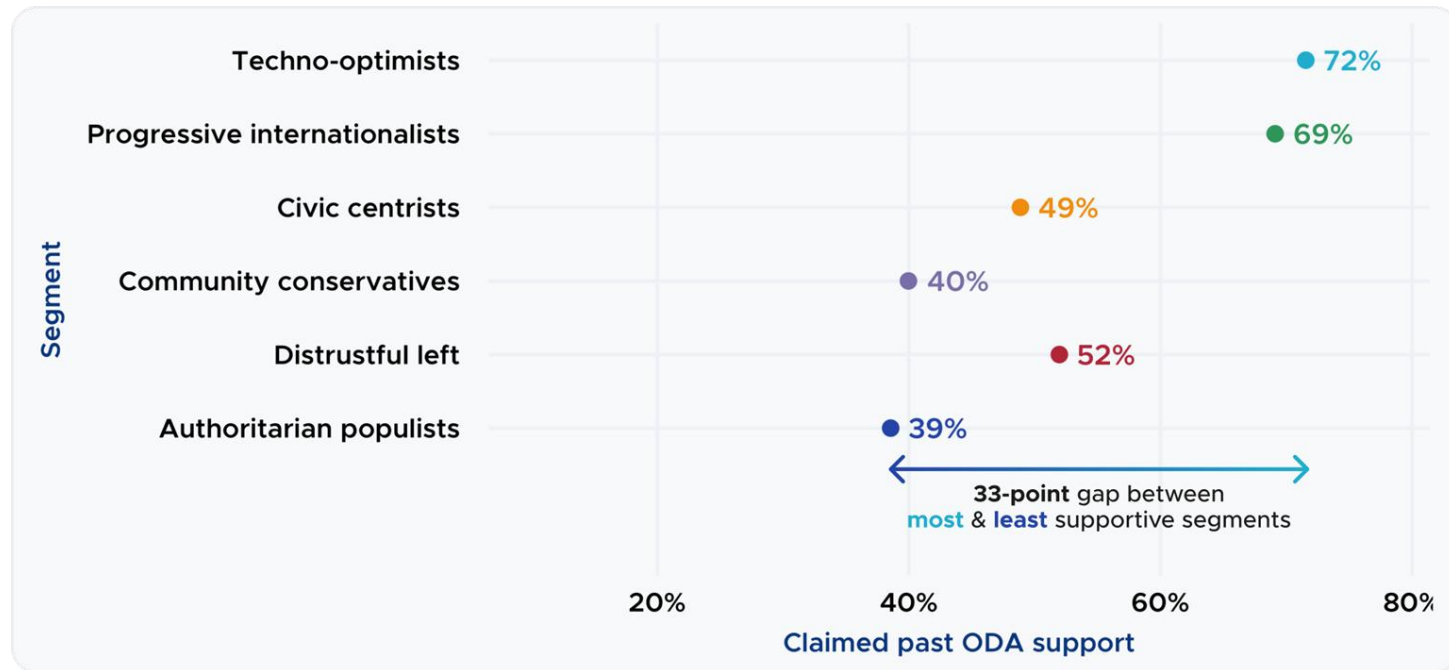


Source: Smith, E.K., Bognar, M.J. & Mayer, A.P. Polarisation of Climate and Environmental Attitudes in the United States, 1973-2022. *npj Clim. Action* 3, 2 (2024).
<https://doi.org/10.1038/s44168-023-00074-1>



Overseas aid faces the same issue as Net Zero

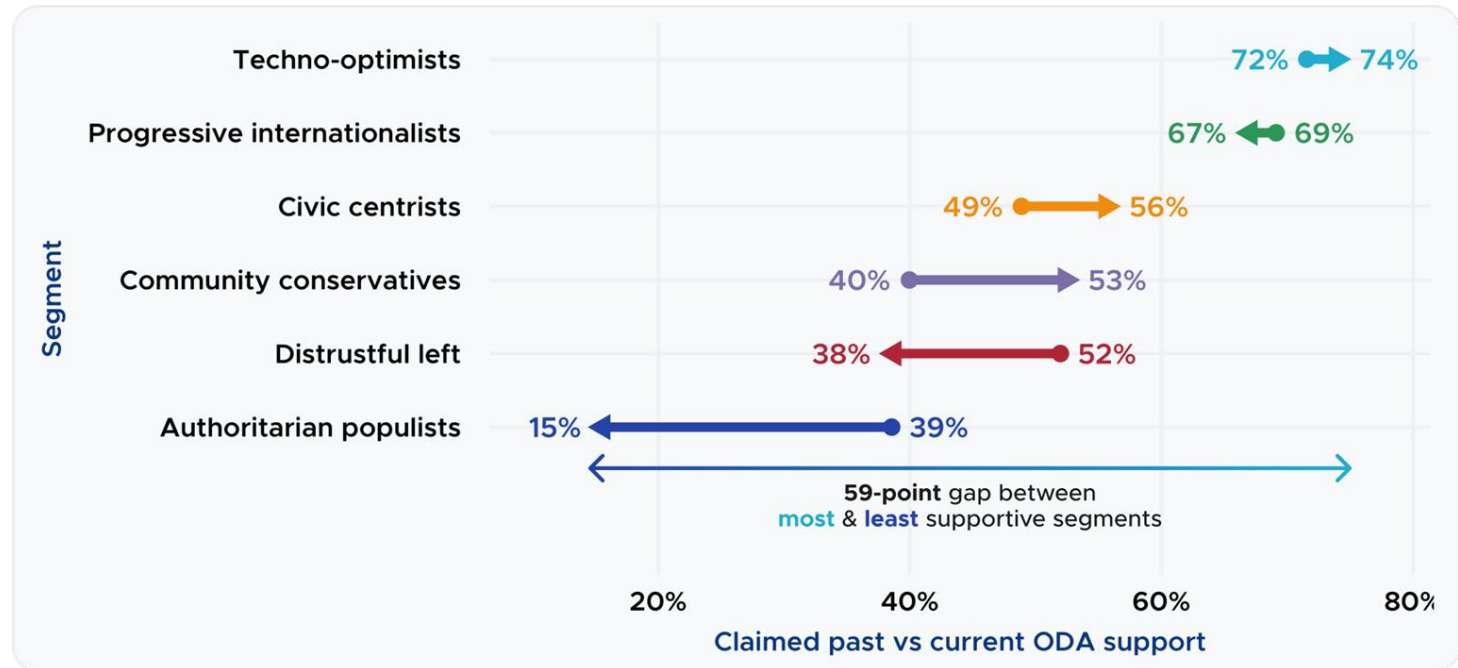
We asked voters what their position on ODA was 10-15 years ago, and found a **33-point** historic ideological gap on support for ODA – moderately sized, but enough to sustain a varied coalition of supporters.





Overseas aid faces the same issue as Net Zero

Based on current positions, this gap has now climbed to **59 points**, with large declines among the most socially-conservative and low-trust groups.



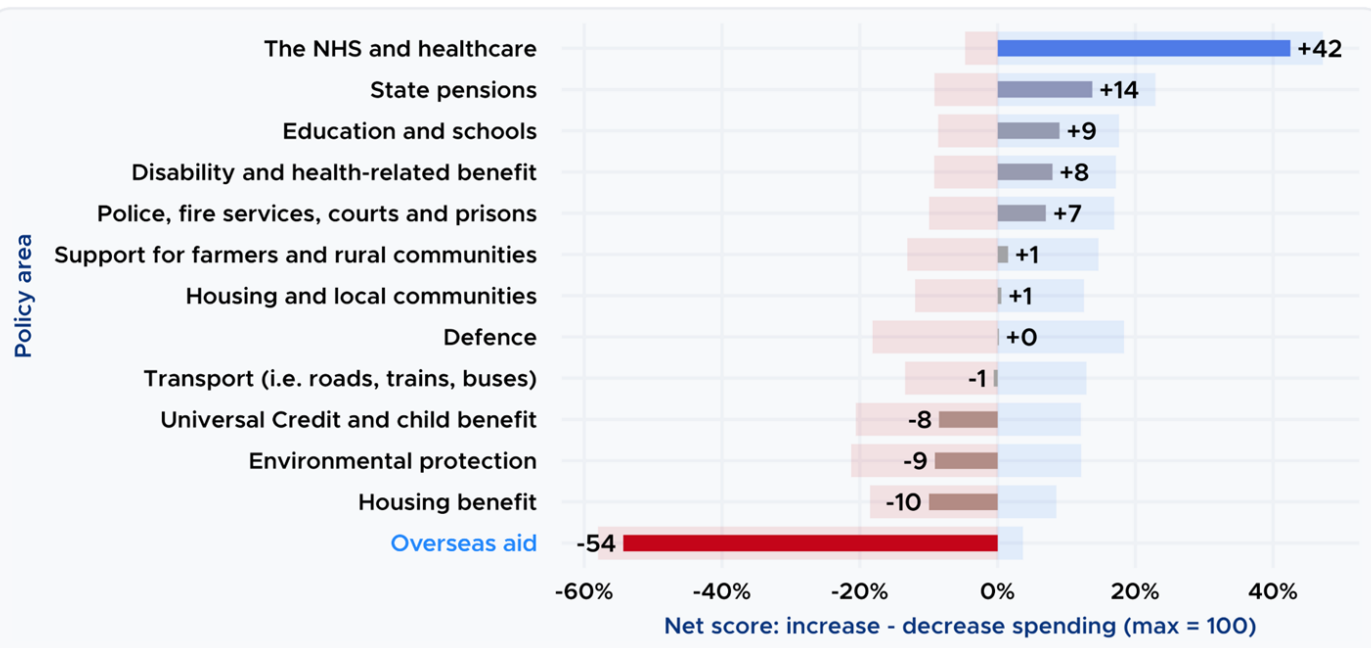


In context, ODA fares *extremely* poorly



Overseas aid is by far the lowest spending priority

MAXDIFF SCORES FOR POLICY AREAS (MAX = +100, MIN = -100)



(Data from an earlier survey)



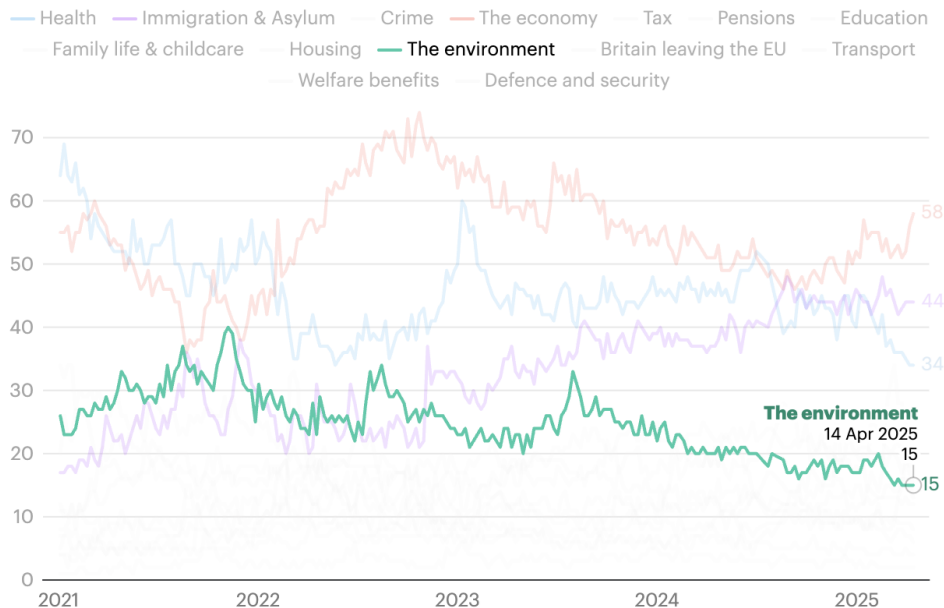
Falling salience, growing polarisation

Climate change has fallen in salience at the same time as it has become more polarised.

‘Low salience, high polarisation’ is the death zone for policy areas, where governments will avoid large scale investment and may even withdraw funding.

The environment has fallen down the agenda

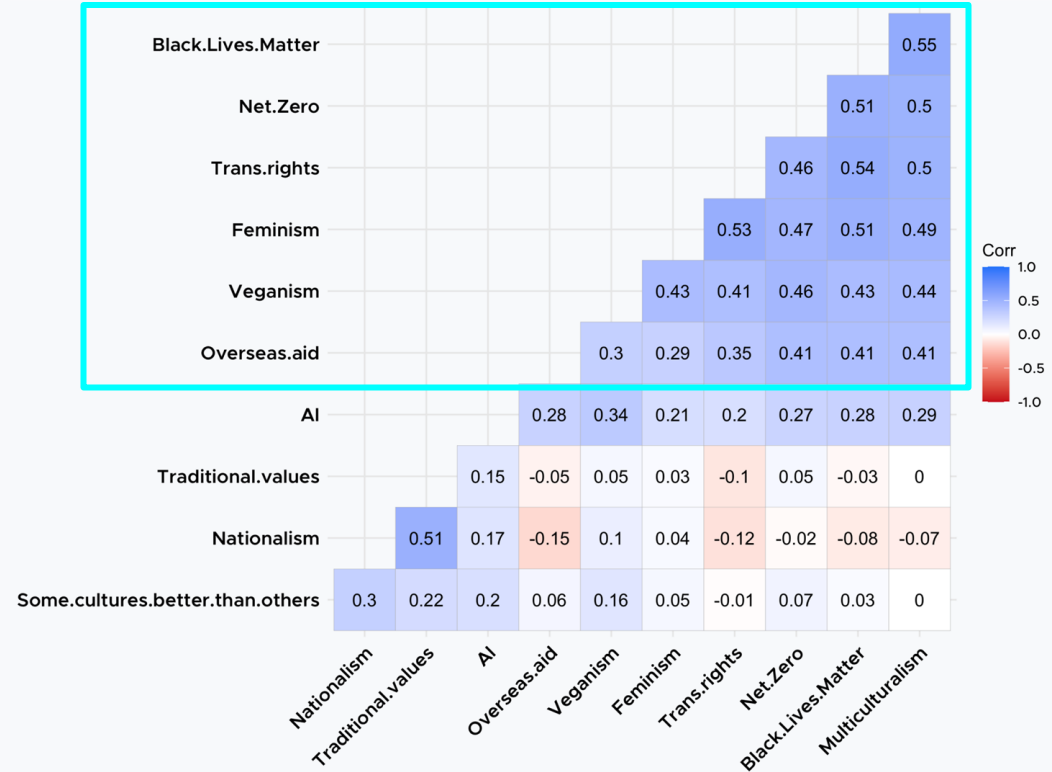
Which of the following do you think are the most important issues facing the country at this time? Please tick up to three. %





Covariance of divisive issues

Views on overseas aid and Net Zero are increasingly correlated with views on the most politically-divisive issues like Black Lives Matter, multiculturalism and trans rights, making consensus harder to achieve.

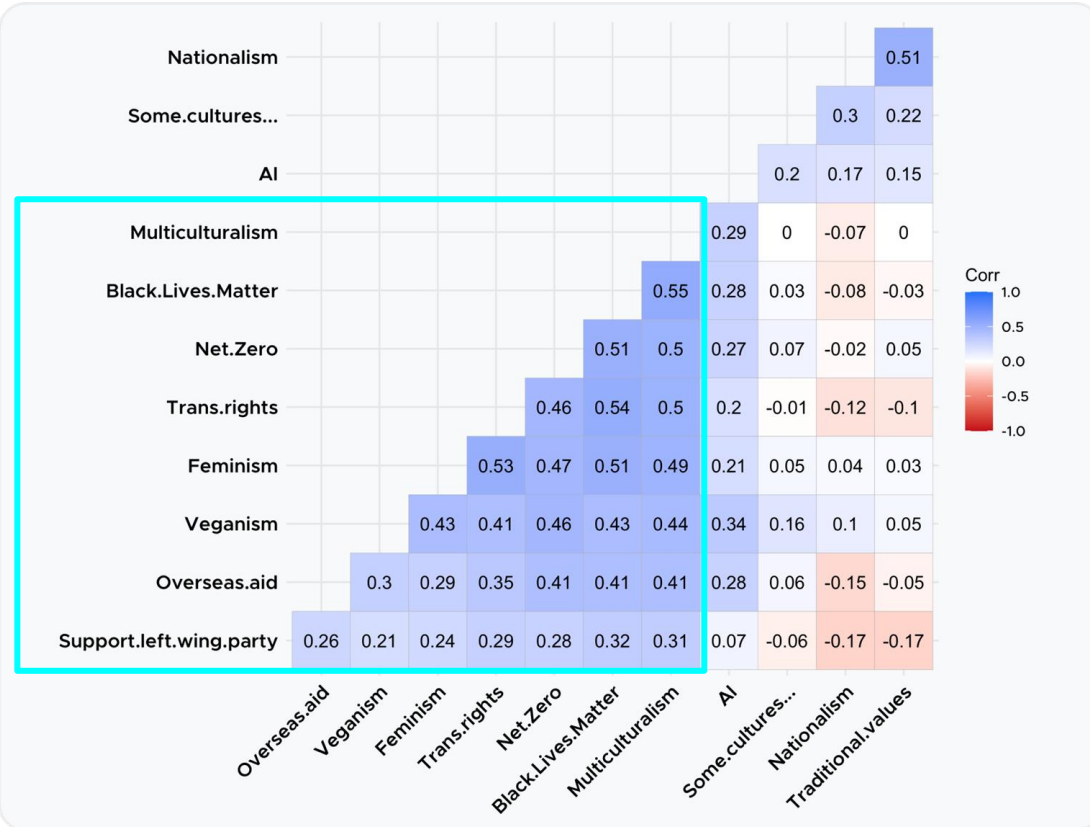




Issue bundling and voting intention

These issues have become explicitly left-coded, and covary as a cluster or 'bundle' with voting intention for left-of-centre parties.

This relationship is true across all the countries we surveyed, though it's particularly strong in the UK and US.





Declining trust in 'elites'

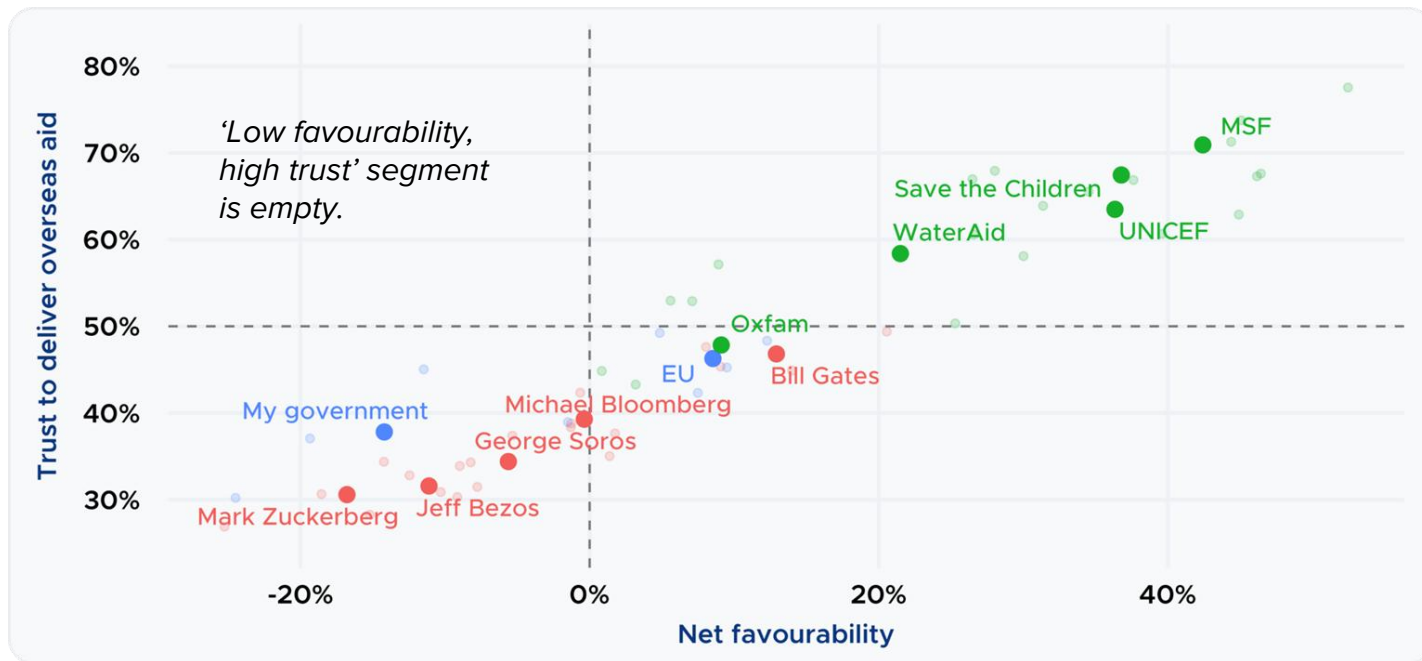
Though Germans are slightly more cautious, voters in all countries tend to agree with 'anti-elite' conspiracy theories.

Net agreement with statement...	France	Germany	UK	US
"No matter who wins elections, real power lies in the hands of a small, unelected elite that secretly controls governments and global institutions."	+26	+3	+25	+25
"People should trust their own research over established institutions"	+29	+12	+33	+26
" Experts and scientists often mislead the public to serve hidden agendas"	+23	+3	+18	+26



Declining trust in 'elites' (but NGOs remain trusted!)

Charitable billionaires are significantly less popular than established charities, and public trust in their ability to deliver overseas aid closely mirrors their overall favourability. In other words, there's little support for the idea that someone can be personally disliked yet still considered effective. An important note here: **the public still trusts non-profits.**

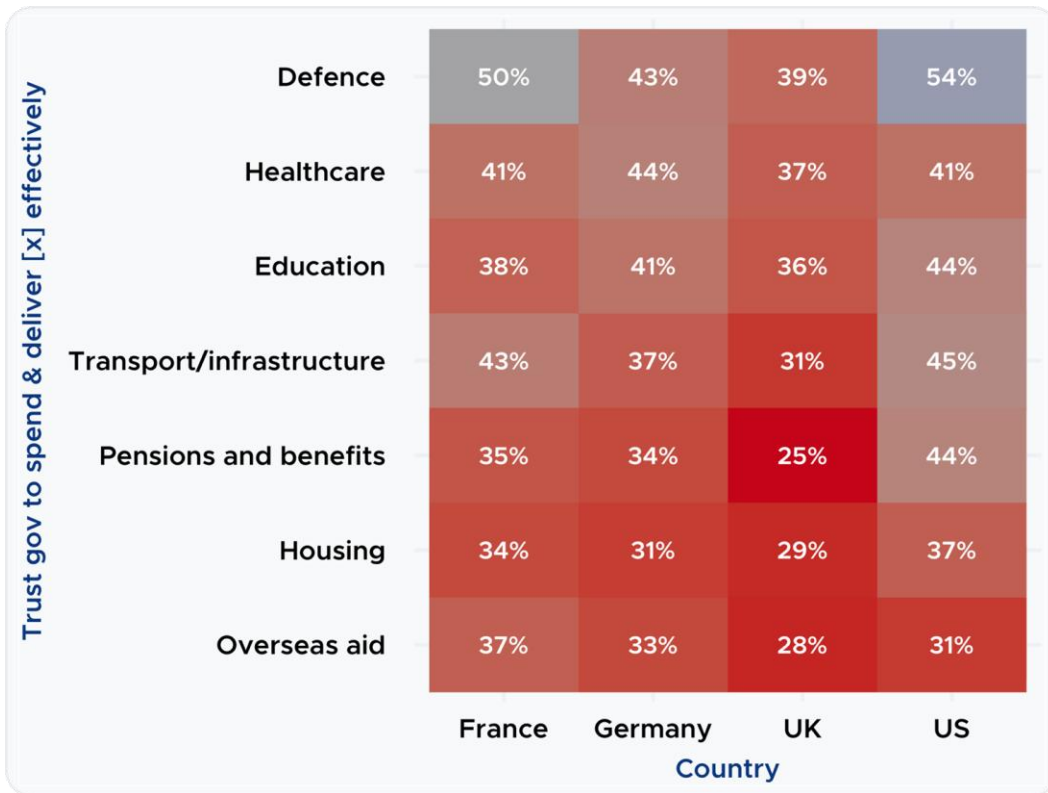




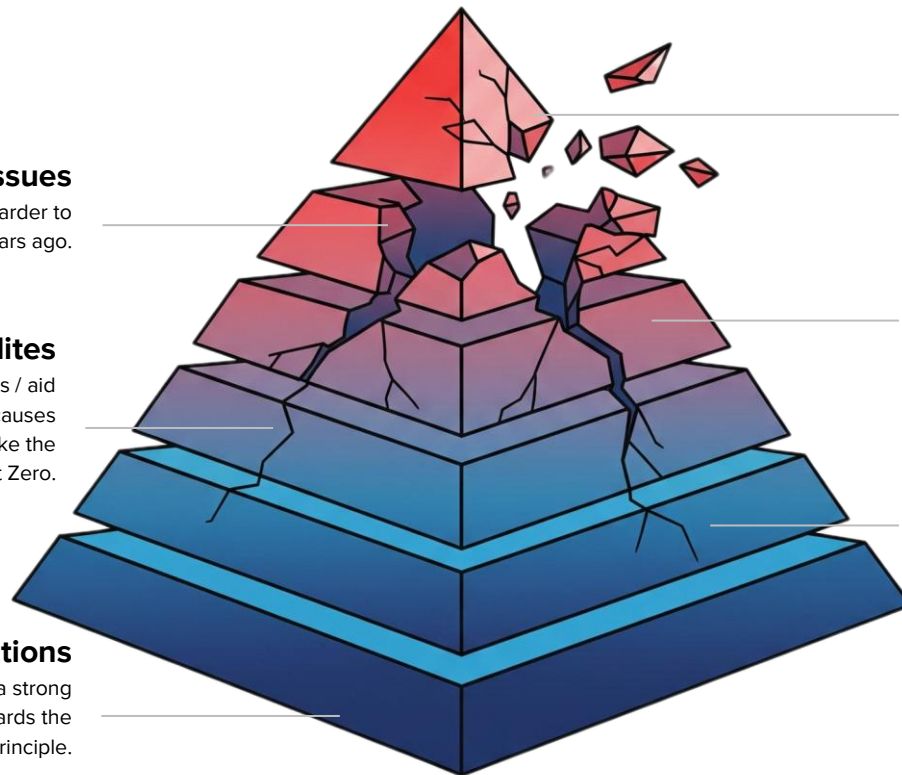
Declining trust in government

On the whole, voters do not trust their government to spend taxpayer money well.

In **every country**, majorities of voters have low levels of trust (i.e. 'only a little' or 'not at all') in their government's ability to ensure taxpayer money is spent effectively, 'so that it goes to the right places and ensures good results'.



The (collapsing) pyramid of support



Covariance of divisive issues

Makes political consensus much harder to achieve than it was 20-30 years ago.

Distrust in elites

Growing antipathy towards governments / aid donors ('benevolent billionaires') causes distrust in top-down initiatives like the transition to Net Zero.

Good intentions

Net Zero and overseas aid sit on a strong foundation of general good will towards the concepts in principle.

Crumbling support

In terms of both crucial voters and government actions.

Politicisation

Growing polarisation of support among groups and swing voters in the new political environment being more aid/Net Zero skeptic leads to political incentives for scaling back measures.

Zero-sum thinking

Leads to greater focus on looking after own country in times of economic crisis and not investing in overseas or long-term growth-based projects.

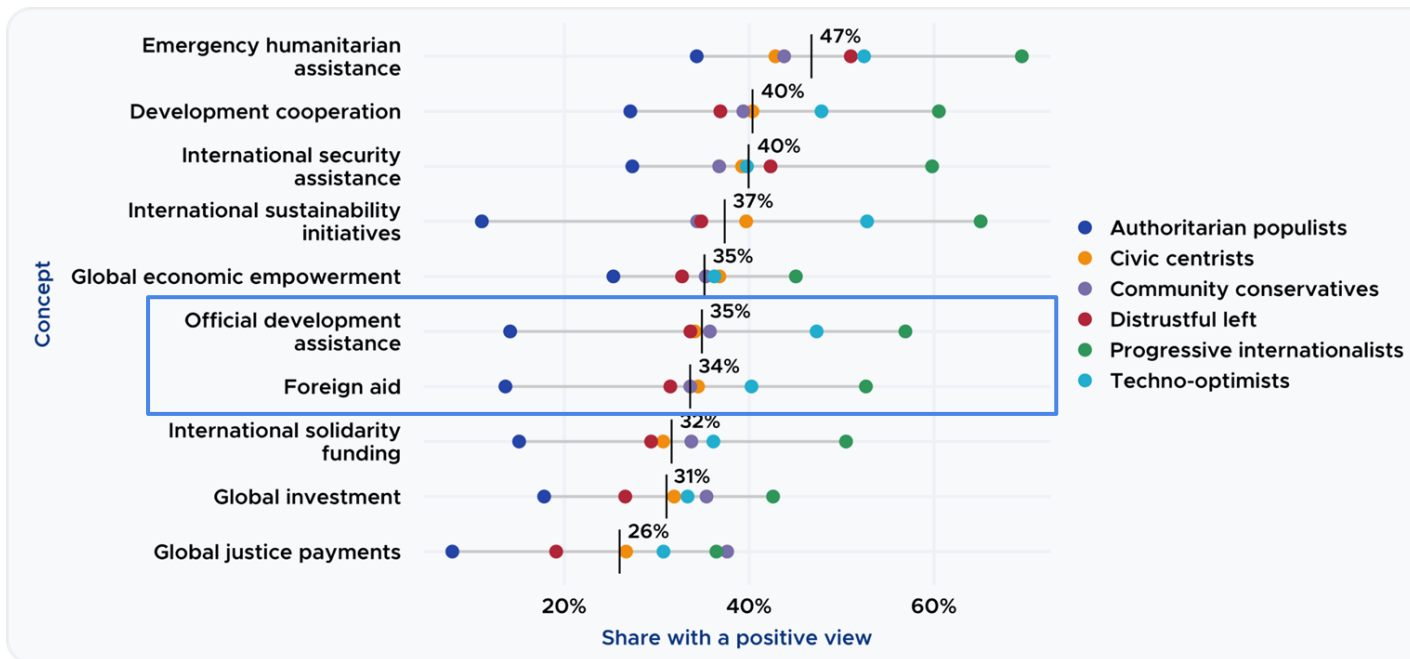


How to fix it

A case study on overseas aid

Best and worst ways to frame aid

‘Foreign aid’ and ‘official development assistance’ are two of the most divisive ways to frame the concept. Language around ‘cooperation’, ‘security’ or emergency assistance fares better.

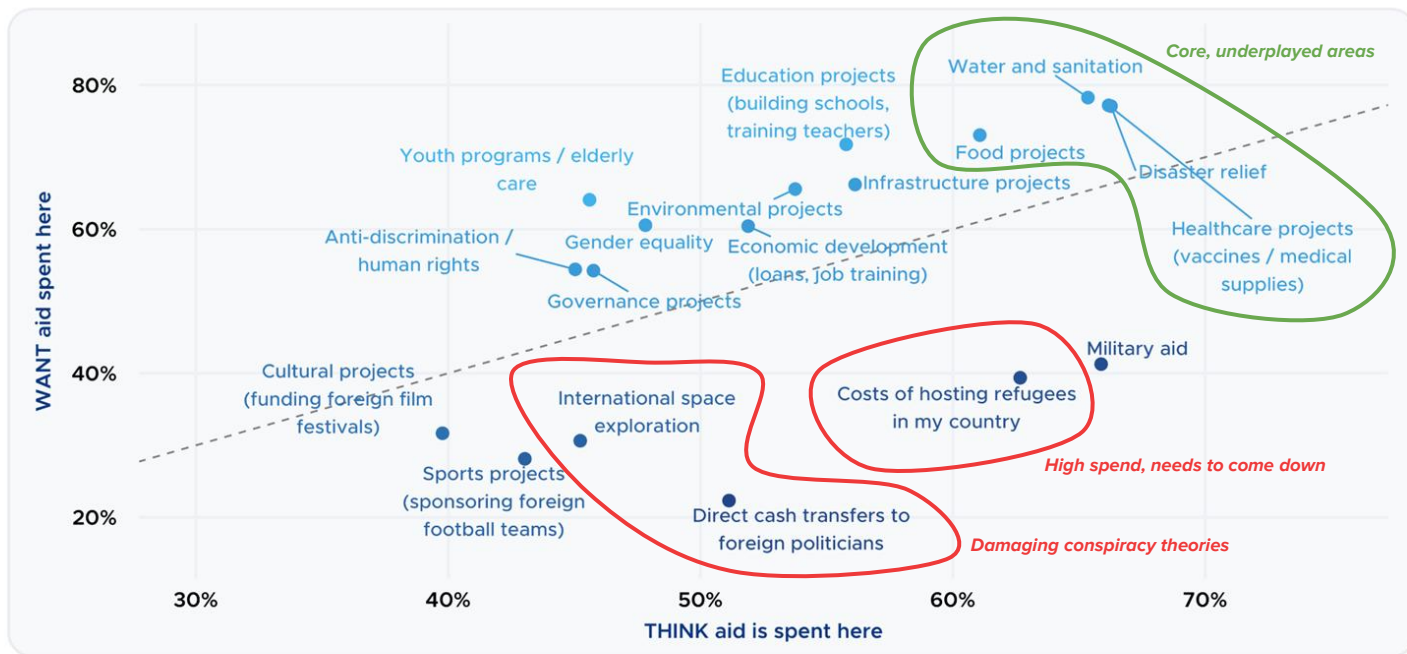


Where aid should (and shouldn't) be spent



Voters want less aid spend on refugees, and more on the basics

WHERE PEOPLE THINK AID IS SPENT VS. WHERE THEY WANT IT TO BE SPENT



Note: We asked people in their own words why they had changed their minds on aid.

Recipient countries allegedly spending money on space programmes was frequently mentioned without prompting.

Fieldwork conducted 3-16 June 2025, with a sample size of 3,225 respondents across the UK, US, France and Germany. Data weighted by age, gender, region, education, past vote, political interest levels and ethnicity (UK/US only).



Message testing: Top performers



A meal. A glass of clean water. A future begins here.

In drought-hit regions across Asia and Africa, children walk for hours to find water that isn't even safe. Aid funds clean water tanks and school meal programs that help keep families alive and children in class.

Clean water and food



No one should die from a treatable disease.

Pneumonia and malaria still kill thousands daily, despite cheap treatments existing. Aid helps fund rural clinics, vaccine drives, and mobile health teams where they're needed most.

Disease treatment



Empower a girl today, transform a community tomorrow.

In too many places, girls are forced to drop out of school to marry early or care for siblings. Aid supports safe classrooms, female teachers, and basic needs like uniforms and menstrual health products — so girls can learn, stay in school, and lead.

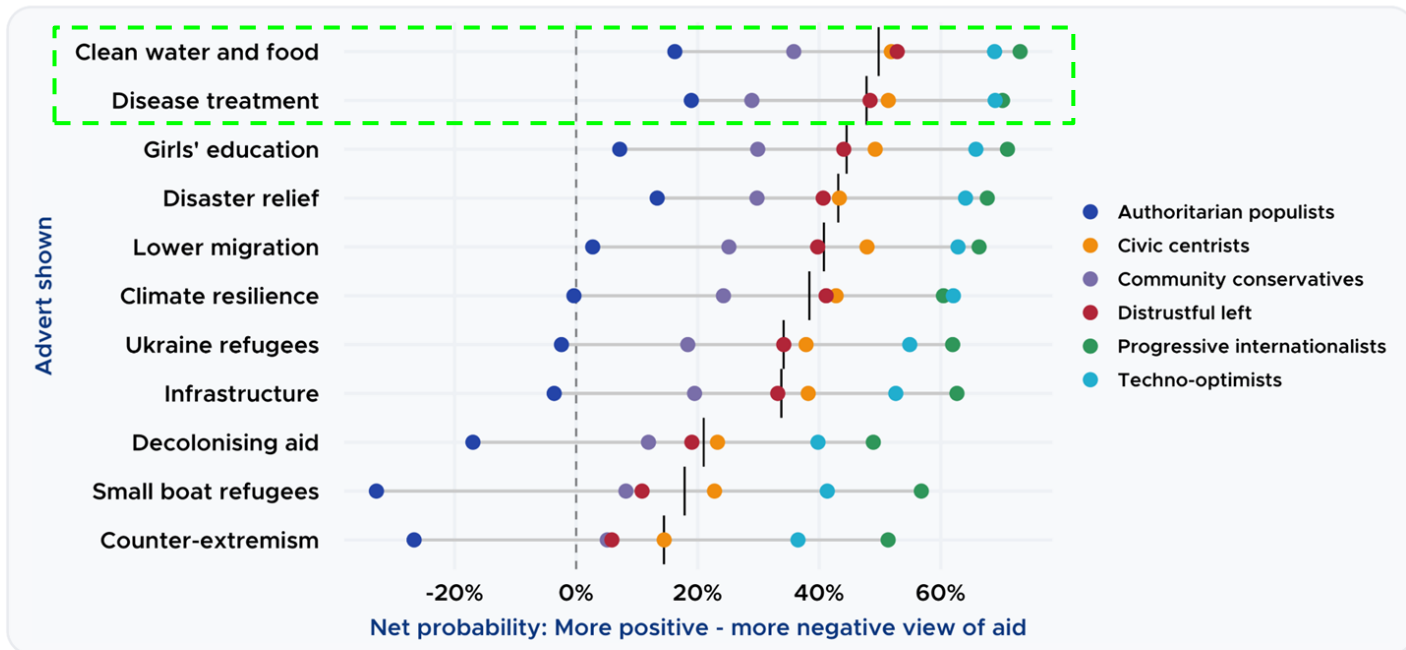
Girls' education

Message testing: Go back to basics



Messages focused on basic human needs are most effective

RESULTS OF OVERSEAS AID MESSAGE TESTING



Fieldwork conducted 3-16 June 2025, with a sample size of 3,225 respondents across the UK, US, France and Germany. Data weighted by age, gender, region, education, past vote, political interest levels and ethnicity (UK/US only).



Top three messages by group

	Authoritarian Populists	Progressive Intls.	Distrustful Left	Techno Optimists	Civic Centrists	Community Conservatives
Clean water and food	2nd	1st	1st	2nd	1st	1st
Disease treatment	1st	3rd	2nd	1st	2nd	4th
Girls' education	4th	2nd	3rd	3rd	3rd	2nd
Disaster relief	3rd	4th	5th	4th	5th	3rd



Latest public opinion

Our latest climate polling

Our latest climate polling

- Just before Christmas ago, we surveyed the British public on attitudes towards climate action.
- It's clear that the key obstacle is **costs and affordability**.
- We used open text responses and then used text analysis tools to codify people's concerns.
 - Among those who thought climate change had become less important, the top themes were concerns on costs (19%) and a shift in priorities to more immediate issues like the cost of living (also 19%).

“

People are struggling. We need to focus on the cost of living first, not funding for expensive projects.

55-year-old woman, Lincoln

 FOCALDATA

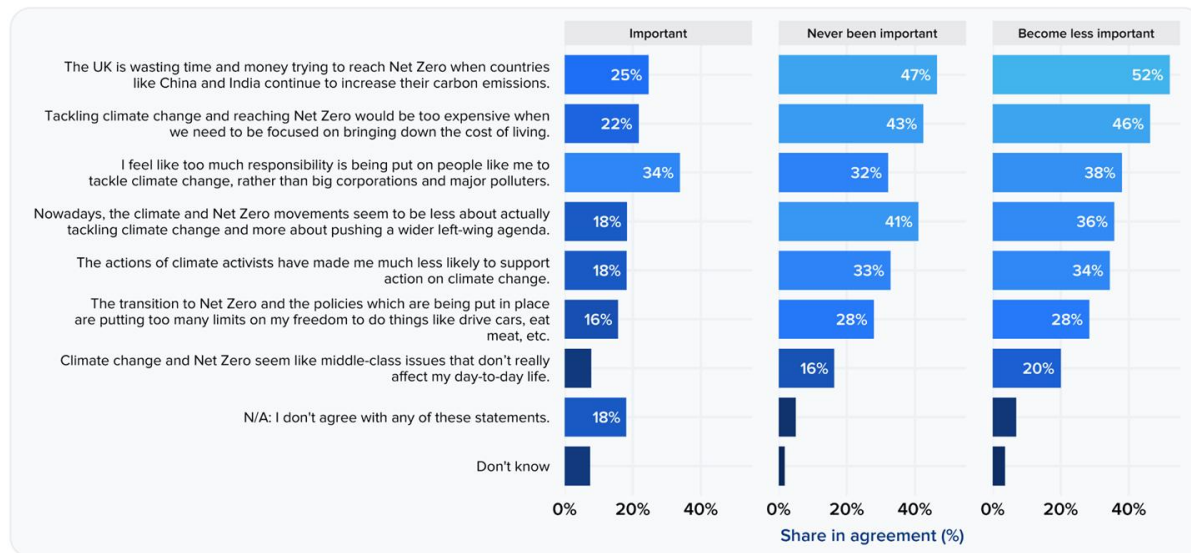
Our latest climate polling

- We tested some anti-climate-action messages to further explore the sector's issues, and grouped responses.
- Climate action is broadly seen as **competing with, rather than contributing to**, cost-of-living solutions.



New climate sceptics back zero-sum and cost arguments

ANTI-NET ZERO MESSAGE SUPPORT BY IMPORTANCE OF CLIMATE CHANGE



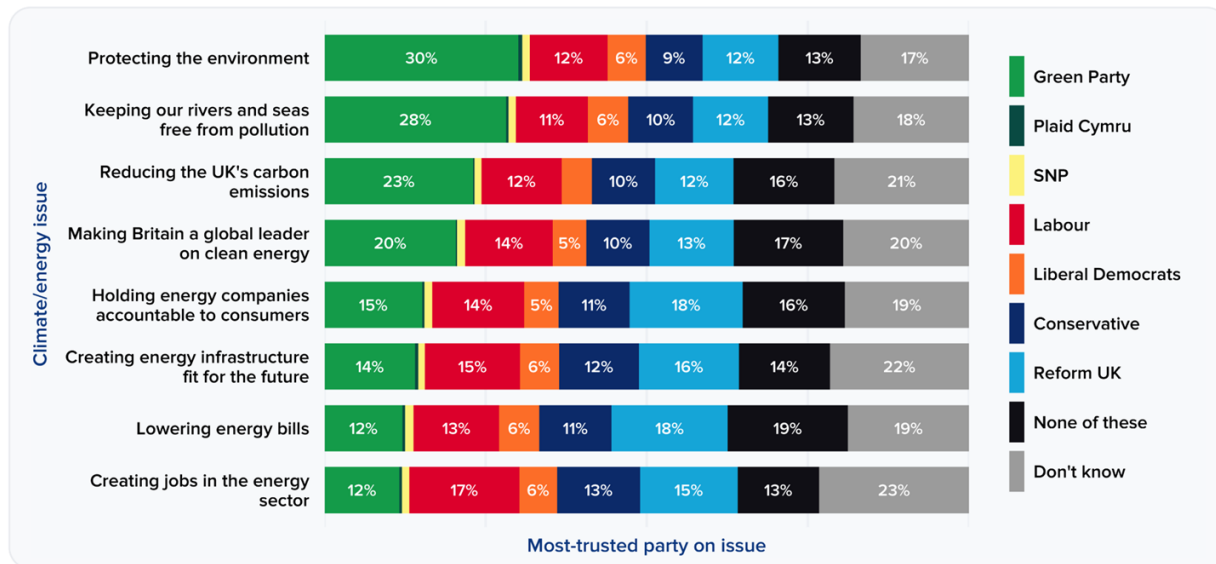
Our latest climate polling

- The issue is somewhat exemplified by the Green Party's issue handling. The party faces the same issues as the wider climate movement: trusted on the environment but not the cost of living.

FOCALDATA

Greens trusted to protect environment, less on cost of living

MOST-TRUSTED PARTY BY CLIMATE/ENERGY TOPIC



Fieldwork conducted 10 to 16 November 2025, with a sample size of 1,487 respondents. Results weighted by age, gender, region, education, ethnicity, recalled 2024 vote and political interest.



How to fix it: Part 2

A case study on climate



Climate messaging approaches

- We used our new conjoint analysis tool to test messages, messengers, tone and focus all together.
- Example message:
 - **Messenger:** “Imagine **Ed Miliband, Secretary of State for Energy Security and Net Zero**, said the following:
 - **Message:** “**By producing more of our food and energy here at home, we can cut emissions, keep prices stable, and build stronger, more self-reliant communities.**
 - **Tone:** “**That’s why we need a clear, practical plan, built on investment, innovation, and accountability.**
 - **Focus:** “This is a challenge for every **region of the UK, but also an opportunity to bring new industries, skills, and pride back to the places that built this country.**”
- Respondents are presented with multiple head-to-heads of messages, and they select their preferred option each time.
- Uncovers the latent preferences of the public.

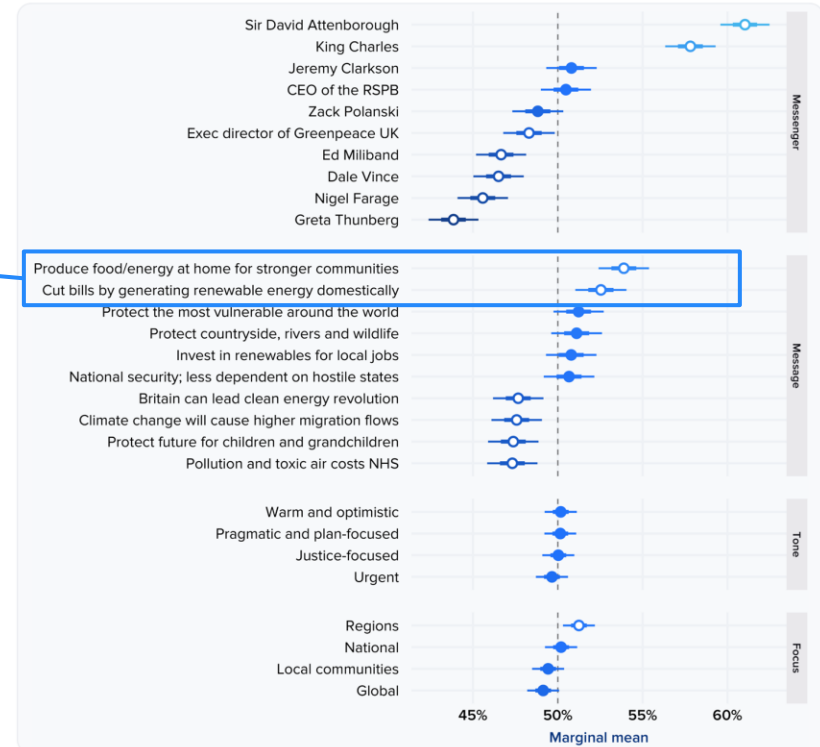
Climate messaging approaches

- Surprisingly, messengers mattered more than the messages themselves. This is unusual for message testing on an issue with such high public awareness!
- David Attenborough is a messaging god. He is essentially unmatched in his ability to deliver climate messages that resonate across political divides.
- Best performing **messages** were on localism and cutting bills. Both have an economic angle.
 - ‘Take back control’ is still a winning message in an age of powerlessness.
- Message tone doesn't seem to have much effect (worth noting that this was a text-based experiment).



Messengers matter more than messages

CLIMATE MESSAGING CONJOINT EXPERIMENT: MARGINAL MEANS



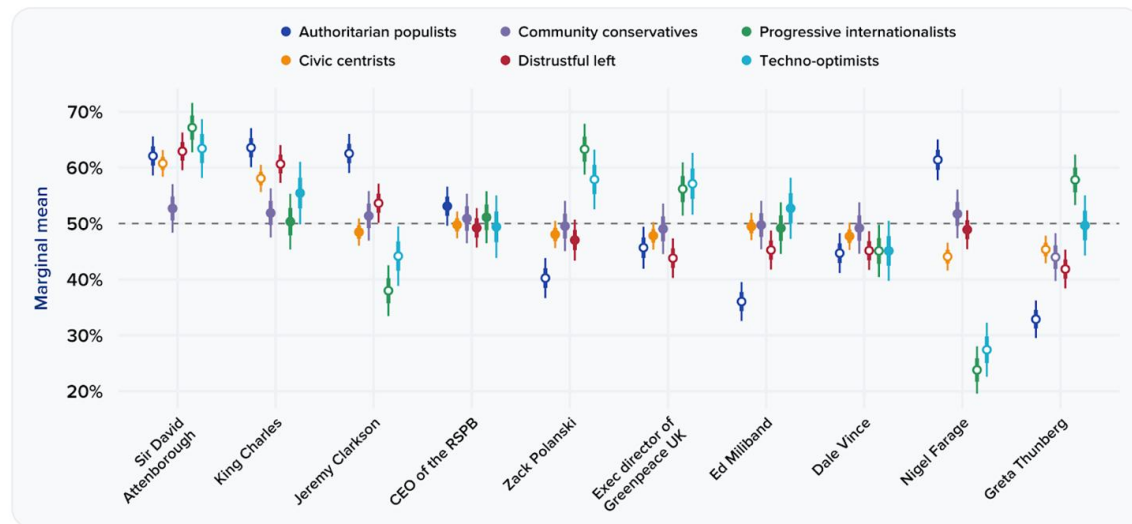
Avoiding activists & politicians is probably wise

- Especially in an era of high political polarisation.
- **Authoritarian Populists, Community Conservatives, Distrustful Left** are the three segments that can help depolarise the debate. Greta Thunberg and Zack Polanski both increase polarisation across segments.



Farage & Thunberg are most divisive messengers

MARGINAL MEANS OF CLIMATE MESSAGERS BY SEGMENT



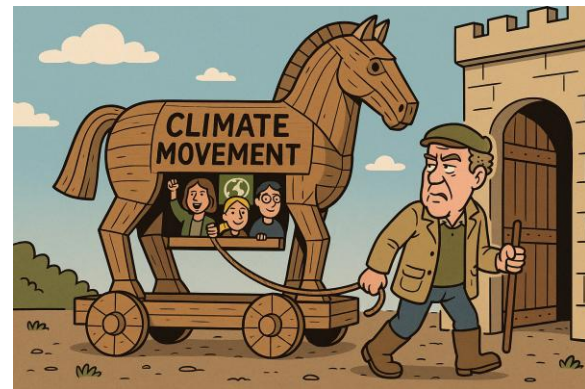
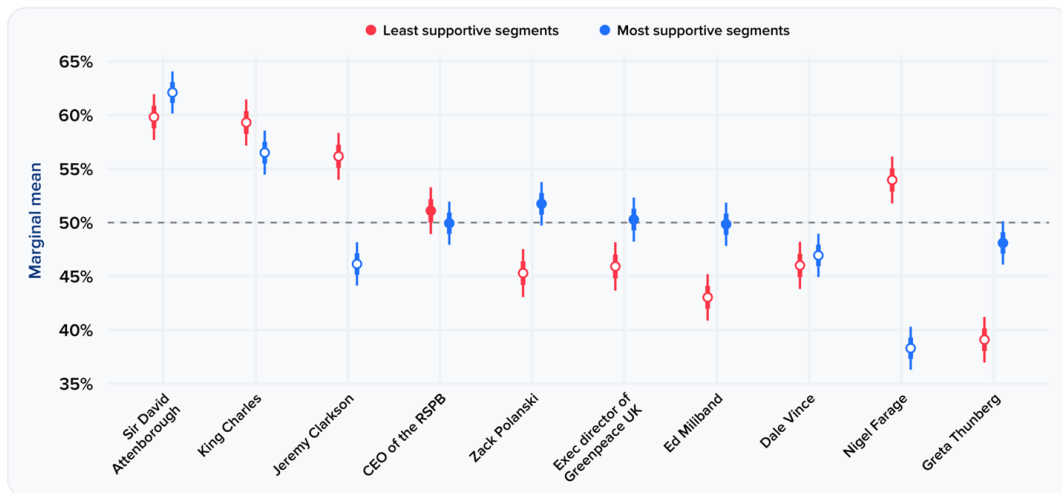
Localism & ‘agrarian populism’ could reduce polarisation

- Figures like Jeremy Clarkson can be very effective among groups least supportive of climate action.
- Nobody is expecting Clarkson to get on board with Net Zero, but messages around localism and supporting British farming by purchasing locally-sourced goods can *indirectly* increase support for lower carbon emissions among the least supportive groups.



‘Agrarian populism’ could win over climate sceptics

MARGINAL MEANS OF CLIMATE MESSENGERS BY SEGMENT GROUP





The movement should step outside its comfort zone

- This is obviously not to say that the entire climate sector needs to hire Jeremy Clarkson for their public-facing comms!
- Focusing on **localism**, **affordability**, and **credible everyday messengers** is the most promising way to prevent climate action from following the same trajectory as overseas aid.

Thank you

www.focaldata.com



Contact

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