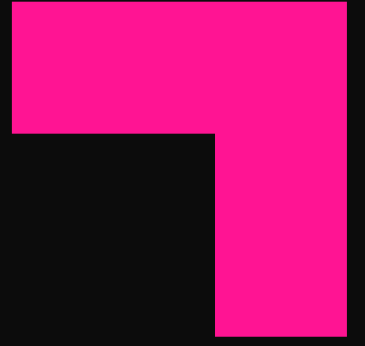


# Mood and Mindset Report 2025

**PN** PORTER  
NOVELLI





**THE PUBLIC  
MOOD IS  
SHIFTING.**

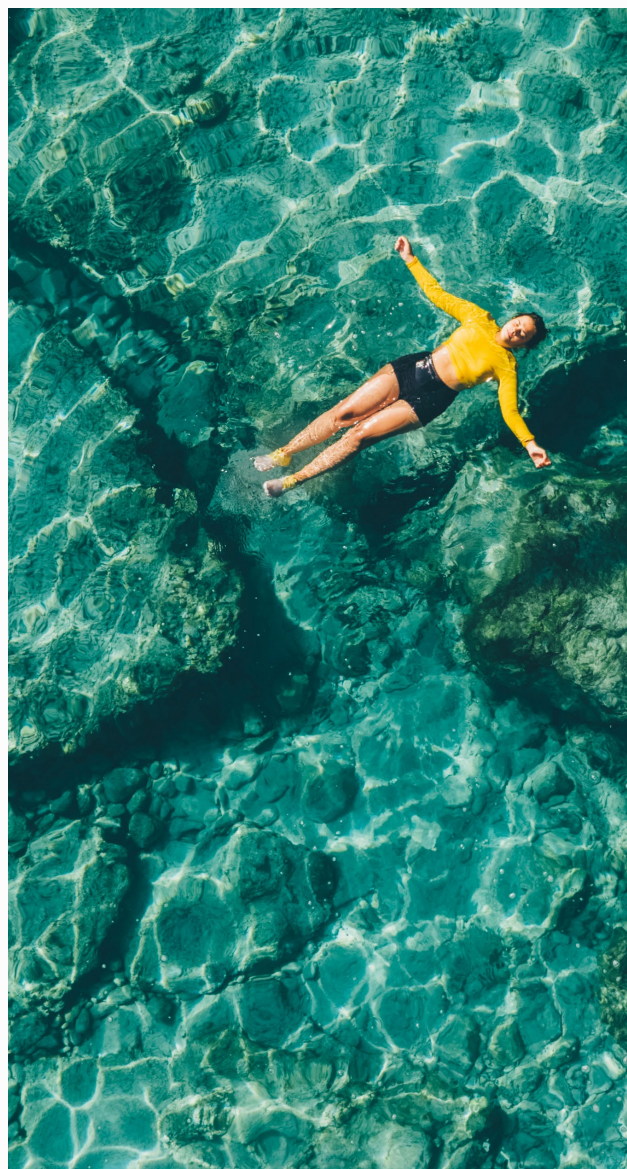
# Are Brands Still Listening?

In the last six months, we've observed a shift in how companies talk about — and act on — their commitments to environmental and cultural issues. Many are reimagining and rearticulating their commitments and programs that tackle climate change and social inequities. A period of “greenhushing” is emerging, where many brands choose to be either discreet or non-committal to climate, equity, and inclusion in the face of political pressure, polarization, and fear of backlash.

But we wanted to know: What does the average person feel right now when it comes to the issues roiling public discourse? What do people want from the companies they buy from? And how are brands' reputations at risk (or not) if they remain quiet and on the sidelines?

The short version: Americans want peace, stability, and a bit more kindness. And they still expect brands to step up.

This report is the first of an ongoing series from Porter Novelli tracking American sentiment at the intersection of mood and motivation for action – we're calling it the Mood + Mindset Report. Fielded in mid-April, we asked 1010 US consumers in communities across the US, from every age group and ideological bent, and found the early signs of what we think is a vibe shift toward action.



# Generational and Political Splits

Gen Z and Liberals are more likely to express hope and a longing for unity and understanding. Boomers and Conservatives tend to feel frustration, skepticism, and a strong desire for stability.

## WHAT PEOPLE SAY THEY NEED MORE OF

Across demographics, the top emotional needs are clear:

1. **Peace and calm (48%)**
2. **Stability (45%)**
3. **Kindness and unity (~43%)**

# Motivators for Action

## WHAT MOVES PEOPLE TO ENGAGE, VOTE, DONATE, OR SPEAK OUT?

1. **Feeling safe to live their values (41%)**
2. **Hearing from leaders who share their beliefs (33%)**
3. **Believing their voice matters (31%)**

## FEAR AND CYNICISM ARE MAJOR BARRIERS:

**40%**

don't believe their actions will make a difference.

**32%**

Fear backlash for their views.

**24%**

Feel underinformed.

# The Role of Brands: Still Strong, Still Scrutinized

Despite all the noise about brand backlash, the data shows public expectations haven't meaningfully softened:

- **86% want companies to stand up for people of all backgrounds and beliefs.**
- **75% say brands should support social and environmental issues.**

Support is especially strong among Gen Z, Millennials, and Liberals, but even among Conservatives, only 17% believe brands should stay out of social/political issues altogether.

And what people want from companies is clear:

1. **Community-based initiatives (30%)**
2. **Changes to business practices (29%)**
3. **Marketing that reflects their values (24%)**

This might be the most interesting tidbit emerging from the data. Almost a third of Americans want companies to show up in action in their neighborhoods. Rather than big statements or national initiatives, making an impact locally is an emerging opportunity for brands to drive relevance and loyalty among the people who buy their products.





# Activism Shows Up at the Register

NEARLY HALF  
[49%]

have “boycotted” a brand because  
of its values.

24%

Have boycotted one.

**Again, Gen Z and Millennials lead here, but the message is consistent:  
values drive behavior.**

**We’re in a period of rebalancing—a purpose rebound, if you will.**

Some companies have gone quiet in the face of political pressure. But silence isn’t neutral—it creates space for distrust and reputational erosion. Meanwhile, the companies staying true to their values are earning deeper loyalty, especially from younger, values-driven consumers.

In a landscape shaped by fear, disconnection, and polarization, brands that operate from a place of clear purpose grounded in values can still stand out and earn brand equity that protects against cultural headwinds or operational missteps.

# APPENDIX

This PN View was conducted online from April 16-18, 2025, among a sample of 1,010 U.S. adults ages 18 and older.

## TOTAL

N=1,010

## GEN Z

N=222

## MILLENNIALS

N=314

## GEN X

N=194

## BOOMER +

N=280

## LIBERALS

N=257

Describe their political affiliation as very liberal or liberal

## MODERATE

N=292

## CONSERVATIVE

N=323

Describe their political affiliation as conservative or very conservative

## LIBERALS

N=257

Describe their political affiliation as other, unsure or prefer not to answer.

PN View surveys are designed by Porter Novelli. They are programmed and fielded by Big Village using opt-in panel members. Quota sampling is used to collect a nationwide sample of respondents who are then weighted by gender, age, region, race/ethnicity, and education to mirror the demographical composition of the U.S. population using Current Population Survey proportions.

This report presents the main findings. Detailed statistical tables are available under separate cover.

