

Global Perceptions of Clean Technologies

December 2025



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Executive Summary

Sentiment toward Clean Technologies

People express a stronger interest in solar panels than in electric vehicles, with many already having purchased or planning to buy them. At least two-thirds across regions are interested in, looking to buy, or have already bought clean technologies, though affordability and practicality are barriers across countries surveyed.



Likelihood of Purchasing Chinese-made Clean Technologies

About half of respondents say they would consider purchasing Chinese clean technologies, with solar panels more appealing than electric vehicles. The likelihood of purchasing Chinese clean technologies has stayed steady or risen across all surveyed countries since 2024.



Support for Government Procurement of Chinese-made Clean Technologies

Nearly seven in ten support their governments' purchasing of Chinese-made solar panels and wind turbines, though North America and Europe show more opposition. Support is strongest in Sub-Saharan Africa, MENA, and Latin America and has held steady or increased in all markets surveyed since 2024.



Generational Differences in Uptake and Interest

Millennials and Gen Z are more likely than other generations to consider buying Chinese-made solar panels and electric vehicles, reflecting generational views of these clean technologies overall. Among young people who are interested in solar panels and electric vehicles but have not bought them, affordability is the main barrier to purchase.



Feelings toward Clean Technologies



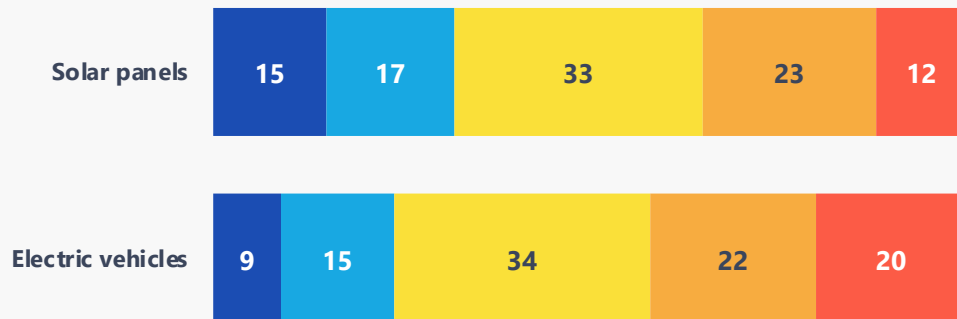
Public interest in solar panels and electric vehicles is high, with solar panels more appealing than electric vehicles.

While some have already bought these cleaner technologies, and still more are interested, affordability and practicality are key barriers to wider adoption globally.

Feelings toward Solar Panels and Electric Vehicles

Average of 33 Countries, 2025

■ Already bought ■ Actively to looking to buy ■ Interested but not affordable
■ Interested but not practical ■ Not interested at all



CH1. Which statement best describes your feelings toward each of the following clean technologies? – Electric vehicles – Solar panels

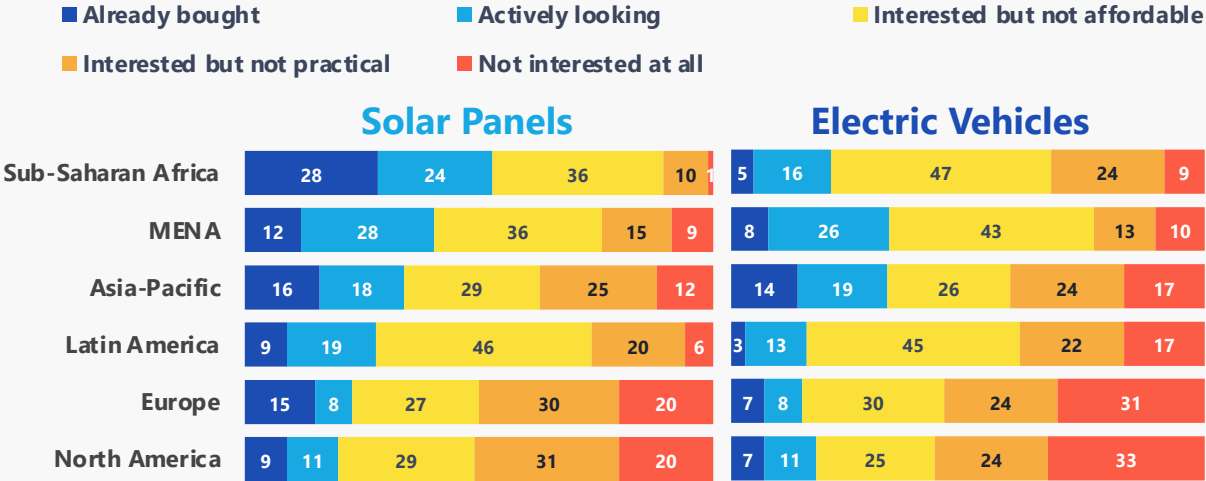
Interest in solar panels and electric vehicles varies regionally, with some geographies more likely to face certain barriers than others.

Interest appears high in the Global South, with the highest active adoption of solar panels and electric vehicles claimed in Sub-Saharan Africa, MENA, and Asia-Pacific.

Outside of Europe and North America, affordability is the primary barrier to purchase for both solar panels and electric vehicles, not impracticality or disinterest.

Feelings toward Solar Panels and Electric Vehicles

Average of 33 Countries, by Region, 2025



CH1. Which statement best describes your feelings toward each of the following clean technologies? – Electric vehicles – Solar panels

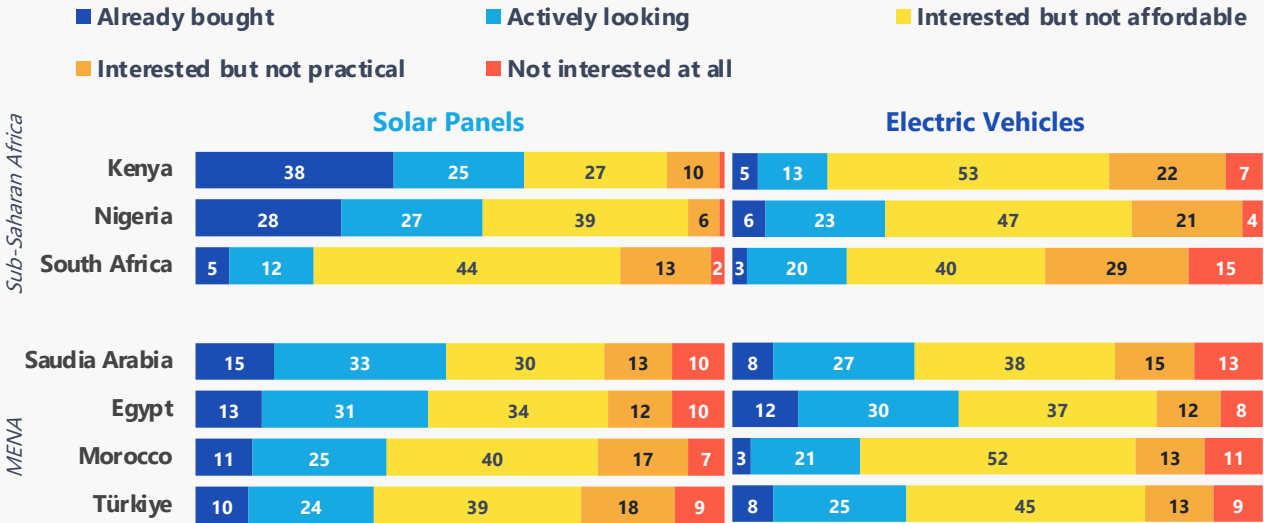
Affordability is the main barrier to uptake of both solar panels and electric vehicles in Sub-Saharan Africa and MENA countries.

Across these regions, people are much more likely to consider solar panels and electric vehicles unaffordable rather than impractical or uninteresting.

In all Sub-Saharan and MENA countries except South Africa, affordability is a more significant barrier for electric vehicles than for solar panels. Compared with other countries in these regions, South Africa is an outlier in these regions for lower uptake of solar panels and higher cost barriers.

Feelings toward Solar Panels and Electric Vehicles

Sub-Saharan Africa and MENA, 2025



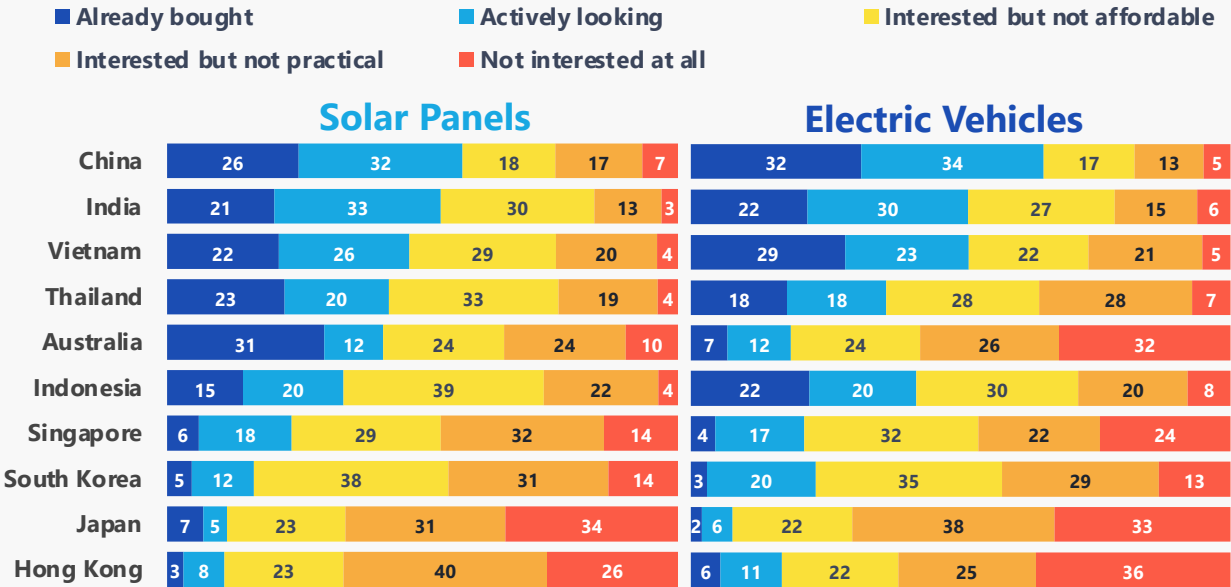
CH1. Which statement best describes your feelings toward each of the following clean technologies? – Electric vehicles – Solar panels

In the Asia-Pacific region, China, India, and Vietnam lead in uptake and interest in both solar panels and electric vehicles.

There is generally a strong interest in solar panels across Asia-Pacific countries surveyed, aside from Japan and Hong Kong, where interest and perceived practicality are low. For electric vehicles, there is more variation in public opinion, with interest also lowest in Hong Kong and Japan as well as in Australia and Singapore.

Feelings toward Solar Panels and Electric Vehicles

Asia-Pacific, 2025



CH1. Which statement best describes your feelings toward each of the following clean technologies? – Electric vehicles – Solar panels

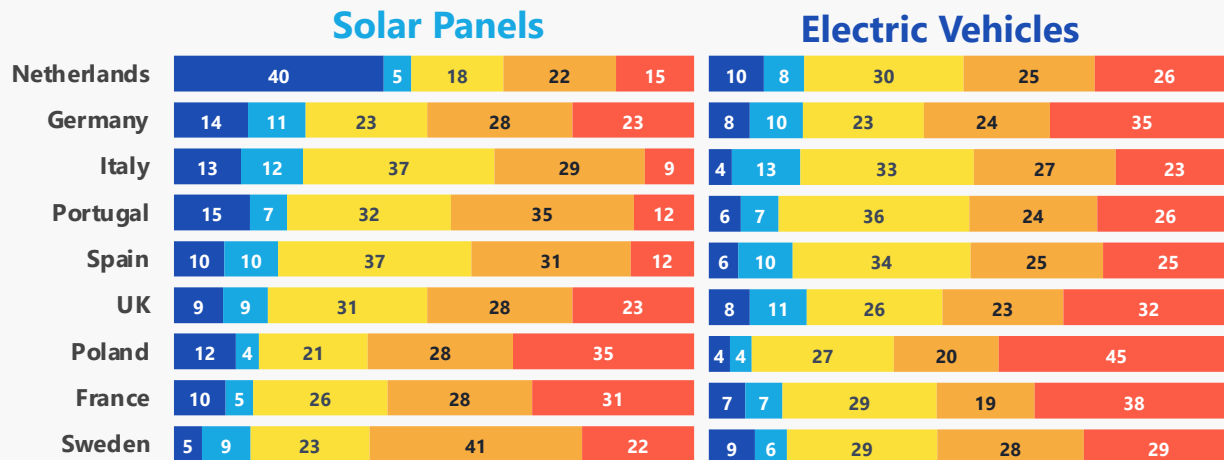
In Europe, solar panels and electric vehicles are not widely adopted, with the exception of solar panels in the Netherlands.

Large proportions of people in Europe are not interested in these clean technologies or feel they are unaffordable or impractical.

Feelings toward Solar Panels and Electric Vehicles

Europe, 2025

■ Already bought
■ Actively looking
■ Interested but not affordable
■ Interested but not practical
■ Not interested at all



CH1. Which statement best describes your feelings toward each of the following clean technologies? – Electric vehicles – Solar panels

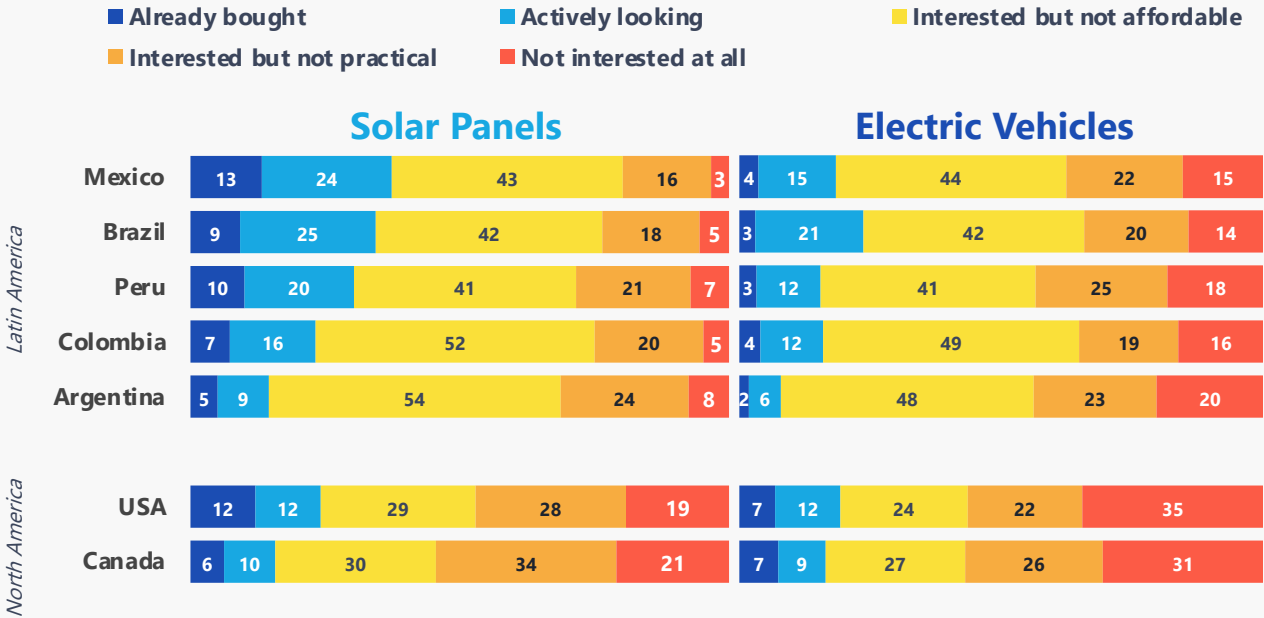
Uptake of solar panels and electric vehicles is relatively low in both Latin America and North America, though the barriers differ regionally.

Across Latin American countries surveyed, more than four in ten say affordability is the main barrier to purchase for both solar panels and electric vehicles.

In North America, views on barriers are more varied as similar proportions consider these technologies unaffordable and impractical and many are not interested at all.

Feelings toward Solar Panels and Electric Vehicles

Latin America and North America, 2025



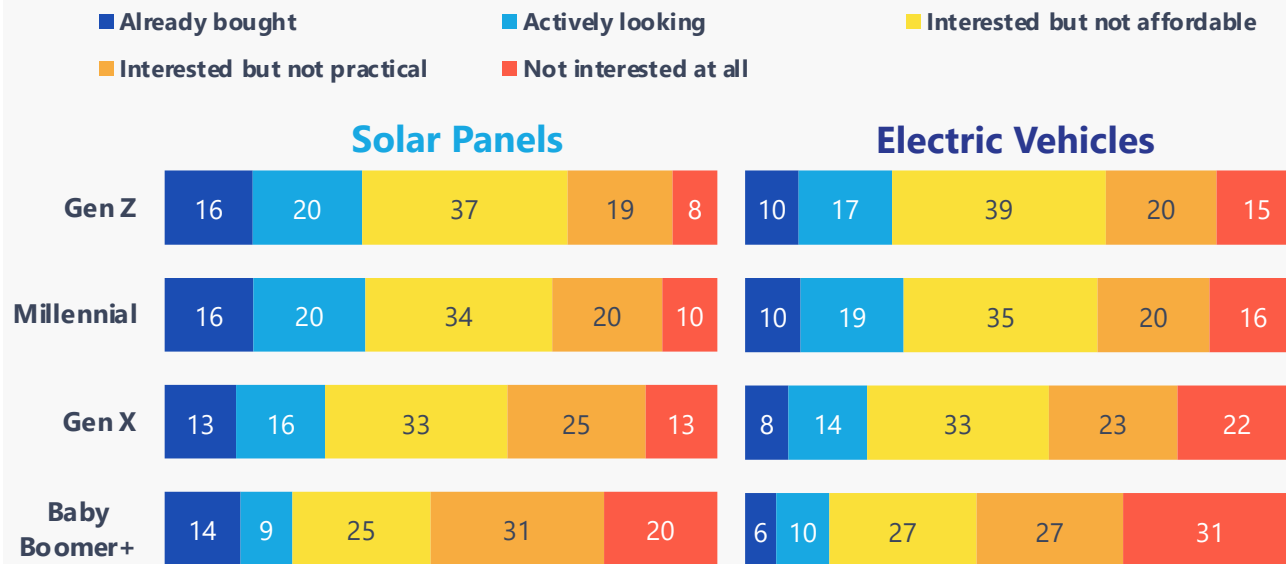
CH1. Which statement best describes your feelings toward each of the following clean technologies? – Electric vehicles – Solar panels

Younger generations are more likely to show interest in purchasing solar panels and electric vehicles than older generations, but many face affordability barriers

There is markedly less interest in electric vehicles compared to solar panels, and this gap widens among older generations. The proportion of people who are interested but cannot afford EVs is also slightly higher than for solar panels.

Feelings toward Solar Panels and Electric Vehicles

Average of 33 Countries, By Generation, 2025



CH1. Which statement best describes your feelings toward each of the following clean technologies? – Electric vehicles – Solar panels



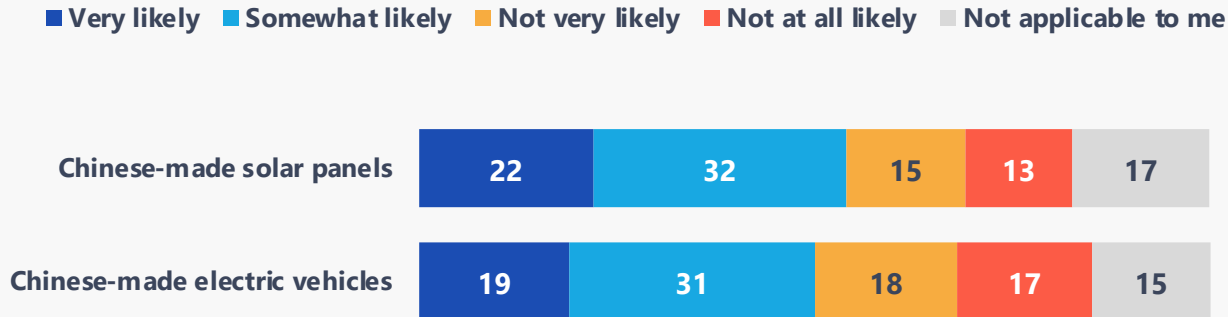
Likelihood of Purchasing Chinese-made Clean Technologies

Around half of consumers are at least somewhat likely to consider buying Chinese-made clean technologies.

At the global level, fewer than one in five say they are “not at all likely,” suggesting that the public is receptive to or could be influenced to purchase Chinese-made solar panels and electric vehicles.

How Likely People Are to Consider Buying Chinese-made Clean Technologies

Average of 33 Countries, 2025

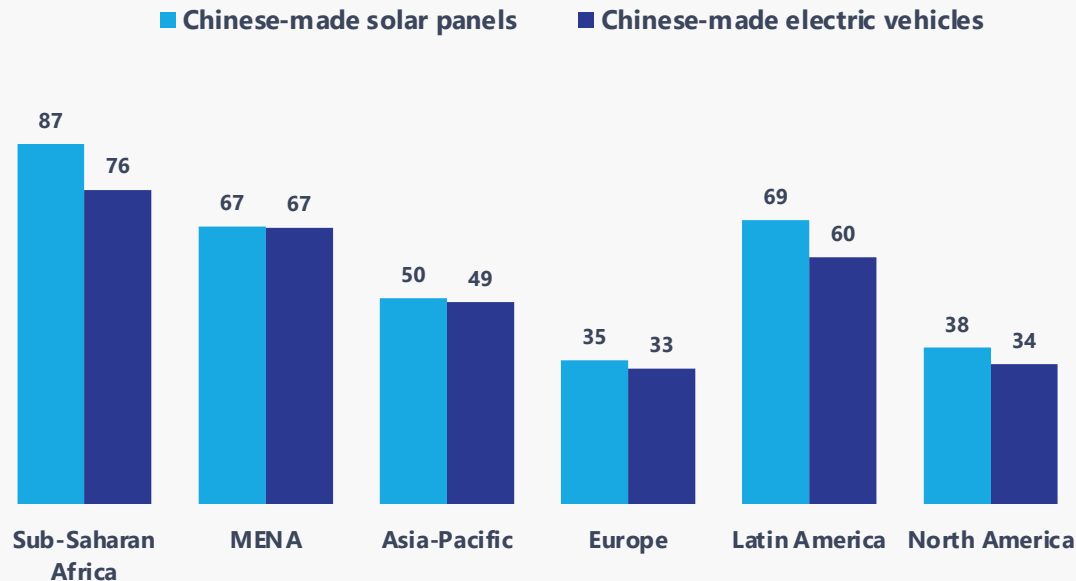


CH2. Clean technologies manufactured in China, such as solar panels and electric vehicles, are currently cheaper than those produced in other countries and often offer the same or better performance. How likely would you be to consider buying each of the following?

Like overall interest in solar panels and electric vehicles, the likelihood of buying Chinese-made versions varies regionally.

People in Sub-Saharan Africa, MENA, and Latin America are the most likely to consider buying Chinese clean technologies, while those in Europe and North America are least likely.

How Likely People Are to Consider Buying Chinese-made Clean Technologies "Very" and "Somewhat Likely" to Consider Buying (1+2), by Region, 2025



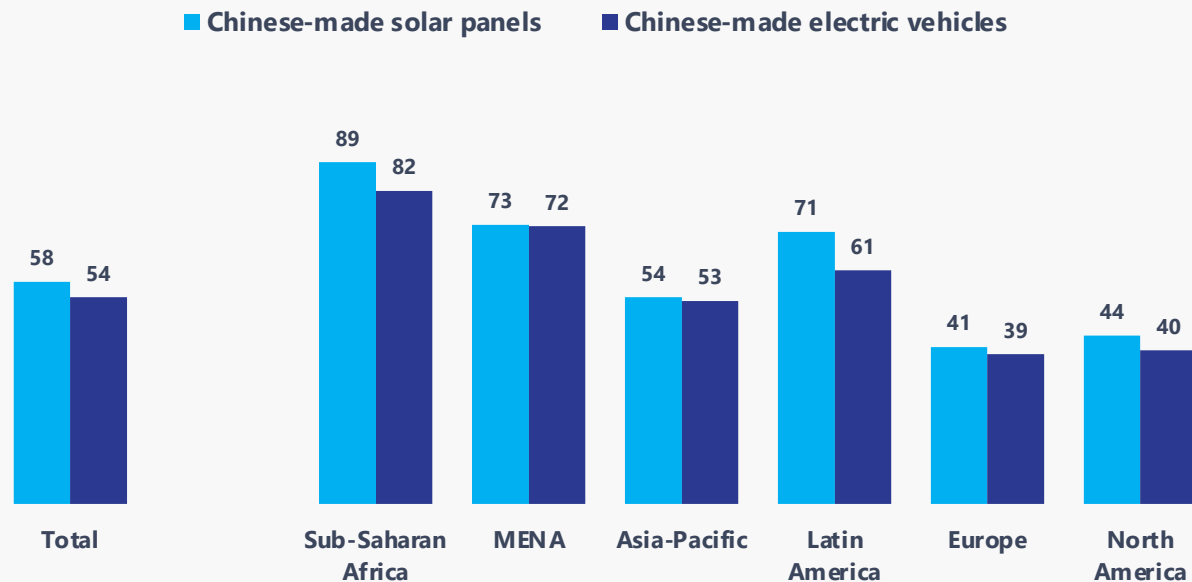
CH2. Clean technologies manufactured in China, such as solar panels and electric vehicles, are currently cheaper than those produced in other countries and often offer the same or better performance. How likely would you be to consider buying each of the following?

Varying regional affinity for Chinese-made technologies also exists among people who have already purchased or are interested in solar panels or EVs.

Current and prospective adopters in Europe and North America are less likely to buy Chinese-made clean technologies compared to those in Sub-Saharan Africa, MENA, and Latin America.

How Likely Those Who Have Already Bought or Are Interested in Buying Clean Technologies Are to Consider Buying Chinese-made Clean Technologies

Subsample: "Very" and "Somewhat Likely" to Consider Buying (1+2), by Region, 2025



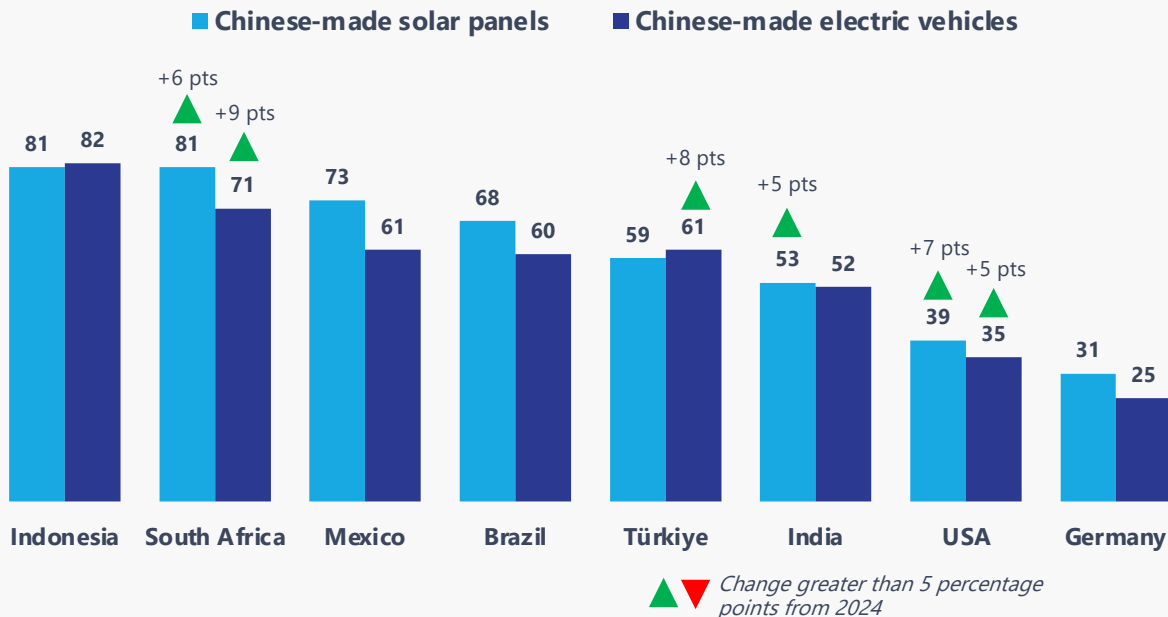
CH2. Clean technologies manufactured in China, such as solar panels and electric vehicles, are currently cheaper than those produced in other countries and often offer the same or better performance. How likely would you be to consider buying each of the following?

The likelihood of purchasing Chinese clean technologies remains consistent or has increased across all 8 countries surveyed in both 2024 and 2025.

While people in the USA have become more likely to purchase both Chinese-made solar and electric vehicles, they remain among the least likely adopters of Chinese-made clean technologies overall.

How Likely People Are to Consider Buying Chinese-made Clean Technologies

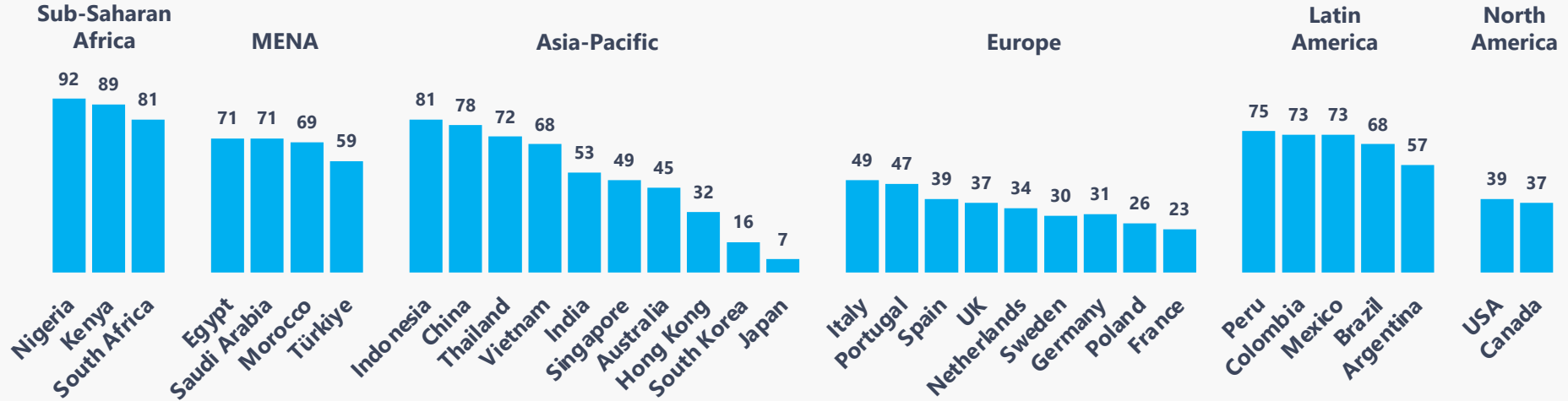
"Very" and "Somewhat Likely" to Consider Buying (1+2), by Region, 2025



CH2. Clean technologies manufactured in China, such as solar panels and electric vehicles, are currently cheaper than those produced in other countries and often offer the same or better performance. How likely would you be to consider buying each of the following?

How Likely People Are to Consider Buying Chinese-made Solar Panels

"Very" and "Somewhat Likely" to Consider Buying (1+2), by Market, 2025

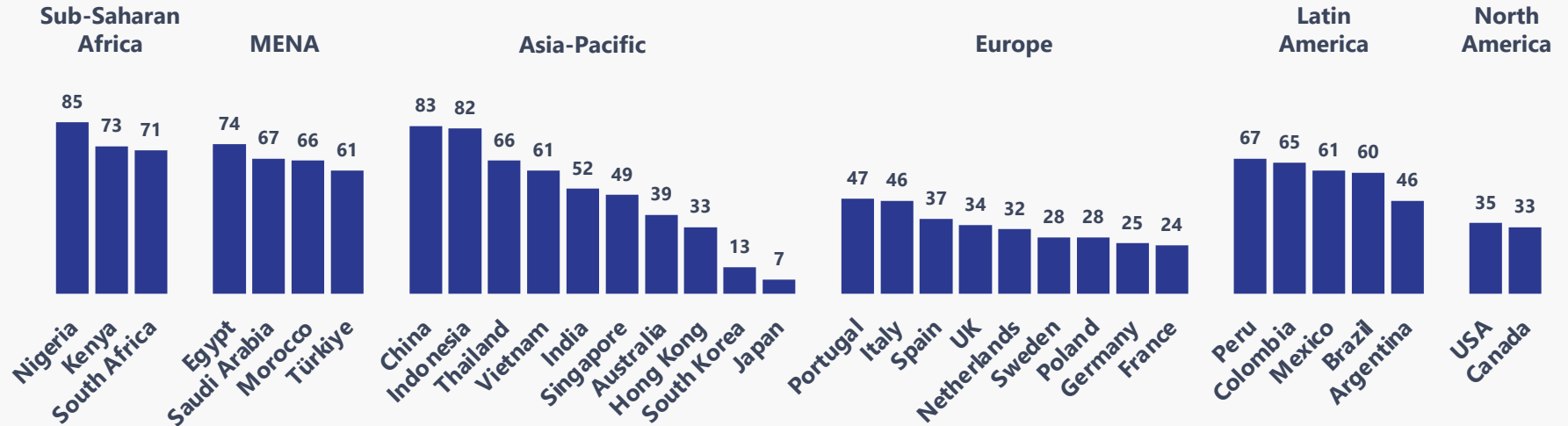


People in Sub-Saharan African countries are more likely than other regions to consider buying Chinese-made solar panels, as well as some Asia-Pacific countries, while others in Asia-Pacific are hesitant or outright rejectors of Chinese-made solar panels.

CH2. Clean technologies manufactured in China, such as solar panels and electric vehicles, are currently cheaper than those produced in other countries and often offer the same or better performance. How likely would you be to consider buying each of the following? - Chinese-made solar panels

How Likely People Are to Consider Buying Chinese-made Electric Vehicles

"Very" and "Somewhat Likely" to Consider Buying (1+2), by Market, 2025



Attitudes toward Chinese-made electric vehicles largely align with attitudes toward solar panels across regions and countries, showing a similar likelihood to purchase across the two categories of Chinese-made clean technologies.

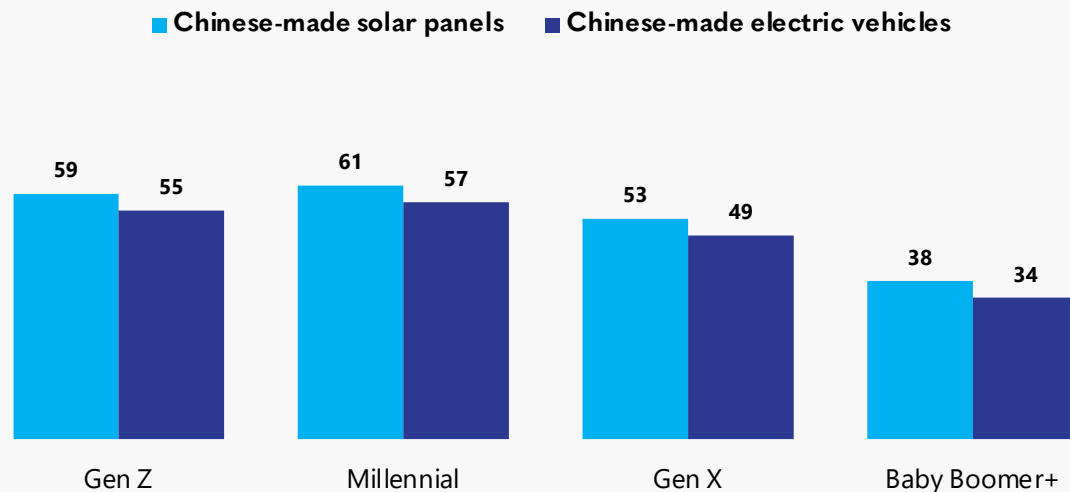
CH2. Clean technologies manufactured in China, such as solar panels and electric vehicles, are currently cheaper than those produced in other countries and often offer the same or better performance. How likely would you be to consider buying each of the following? - Chinese-made electric vehicles

Younger consumers are most likely to consider buying Chinese-made clean technologies while Baby Boomers are the least likely.

The likelihood of buying Chinese-made clean technologies aligns with generational patterns of uptake and interest in solar panels and EVs in general.

How Likely People Are to Consider Buying Chinese-made Clean Technologies

"Very" and "Somewhat Likely" to Consider Buying (1+2), by Generation, 2025



CH2. Clean technologies manufactured in China, such as solar panels and electric vehicles, are currently cheaper than those produced in other countries and often offer the same or better performance. How likely would you be to consider buying each of the following?



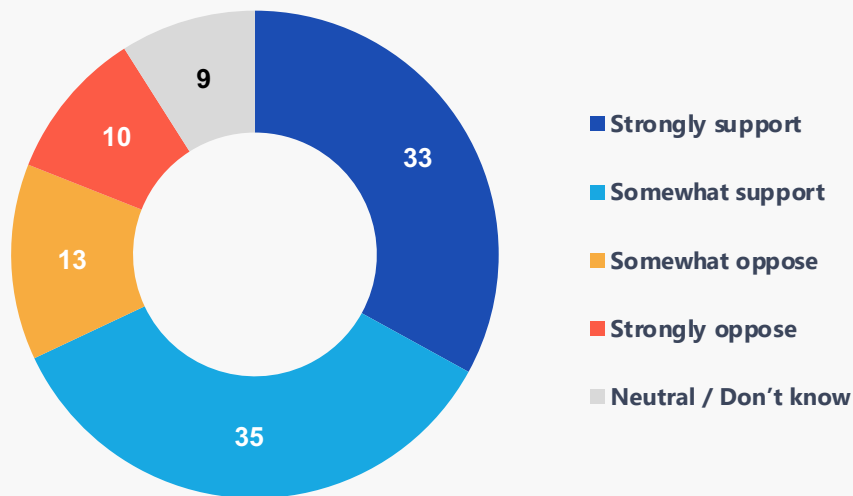
Support for Government Buying Chinese-made Clean Technologies

Around the world, a large majority of consumers would support their government buying Chinese-made solar panels and wind turbines.

Nearly seven in ten consumers would at least somewhat support their government buying these technologies from China, while less than a quarter would oppose.

Level of Support for Government Buying Chinese-made Clean Technologies

Average of 31* Countries, 2025



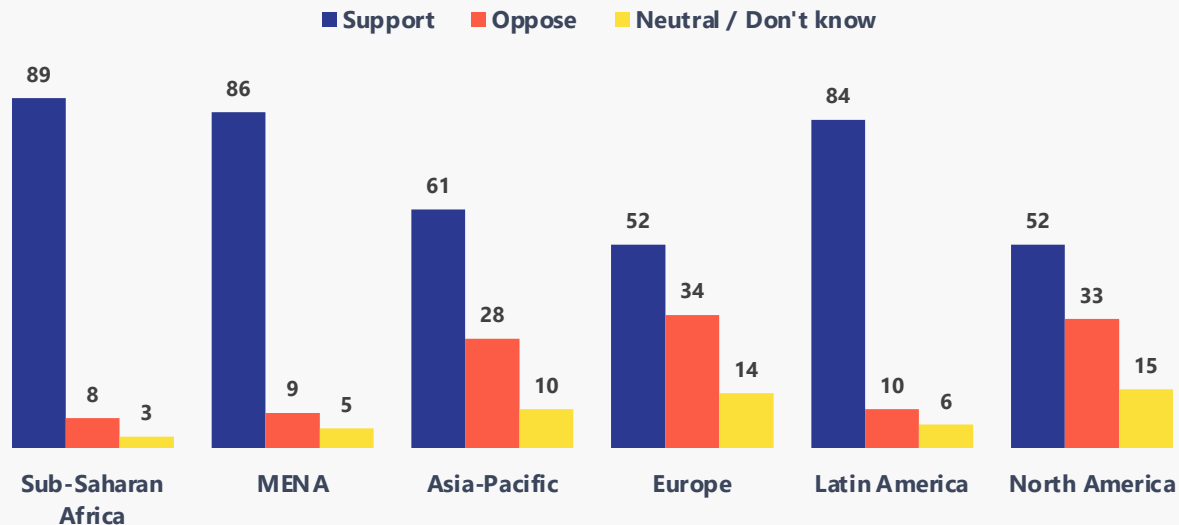
CH3. How would you feel about your government buying solar panels and wind turbines from China, provided they are cheaper and offer the same or better performance than those produced in other countries? (Not asked in China and Hong Kong)

Attitudes toward the government buying Chinese-made clean technologies differ across regions.

People show overwhelming support for their governments buying Chinese-made clean technologies in Sub-Saharan Africa, MENA, and Latin America, while support is lowest among those in Europe, North America, and Asia-Pacific.

Level of Support for Government Buying Chinese-made Clean Technologies

"Strongly" and "Somewhat Support" (1+2) vs "Strongly" and "Somewhat Oppose" (3+4), by Region, 2025



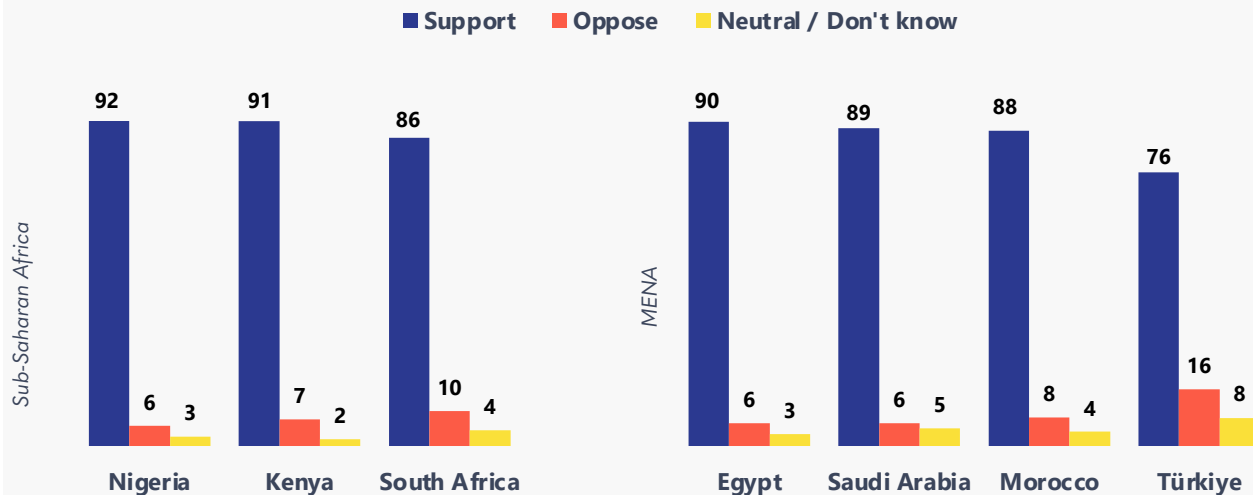
CH3. How would you feel about your government buying solar panels and wind turbines from China, provided they are cheaper and offer the same or better performance than those produced in other countries? (Not asked in China and Hong Kong)

Sub-Saharan Africa and MENA

In Sub-Saharan Africa and MENA, support for Chinese clean technologies is high across countries surveyed, with the lowest level of support in Türkiye (with a large majority of three-quarters still saying they support).

Level of Support for Government Buying Chinese-made Clean Technologies

"Strongly" and "Somewhat Support" (1+2) vs "Strongly" and "Somewhat Oppose" (3+4),
Sub-Saharan Africa and MENA, 2025



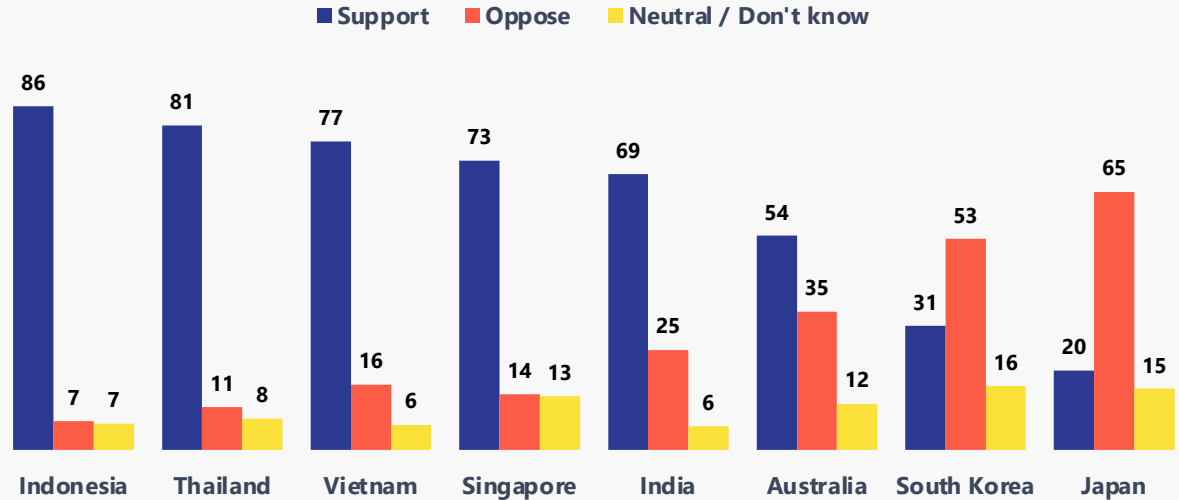
CH3. How would you feel about your government buying solar panels and wind turbines from China, provided they are cheaper and offer the same or better performance than those produced in other countries?

Asia-Pacific

Consumers in South and Southeast Asia are the most likely to support their governments buying Chinese-made clean technologies, while majorities in South Korea and Japan are strongly opposed.

Level of Support for Government Buying Chinese-made Clean Technologies

"Strongly" and "Somewhat Support" (1+2) vs "Strongly" and "Somewhat Oppose" (3+4), Asia-Pacific, 2025



CH3. How would you feel about your government buying solar panels and wind turbines from China, provided they are cheaper and offer the same or better performance than those produced in other countries? (Not asked in China or Hong Kong)

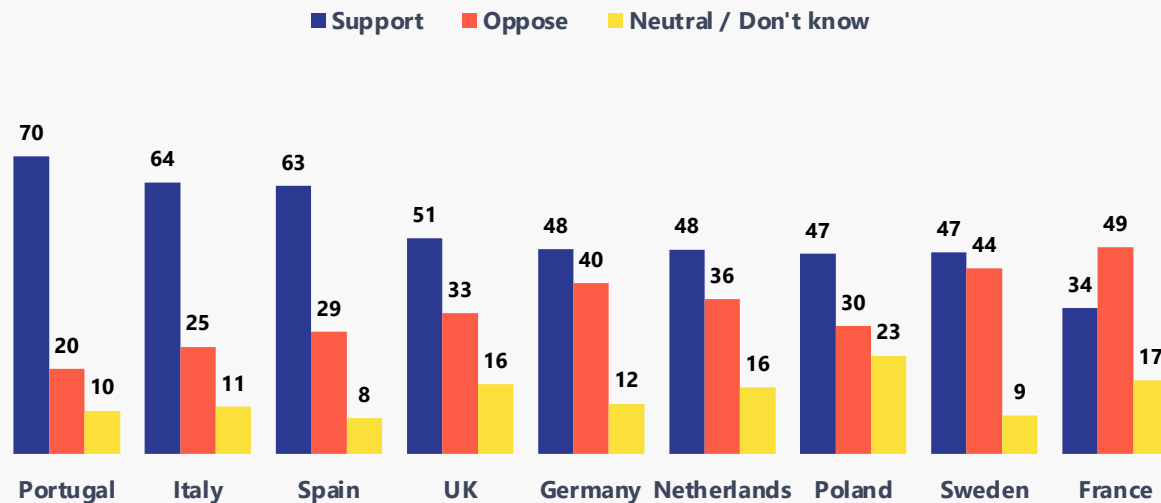
Europe

Compared to other regions, people in Europe are less emphatic in their support for Chinese-made clean technologies, with mixed views across the region.

While over six in ten in Portugal, Italy, and Spain support their governments buying Chinese-made clean technologies, in the UK, Germany, and the Netherlands, only around half are supportive. In France, nearly half are opposed.

Level of Support for Government Buying Chinese-made Clean Technologies

"Strongly" and "Somewhat Support" (1+2) vs "Strongly" and "Somewhat Oppose" (3+4), Europe, 2025



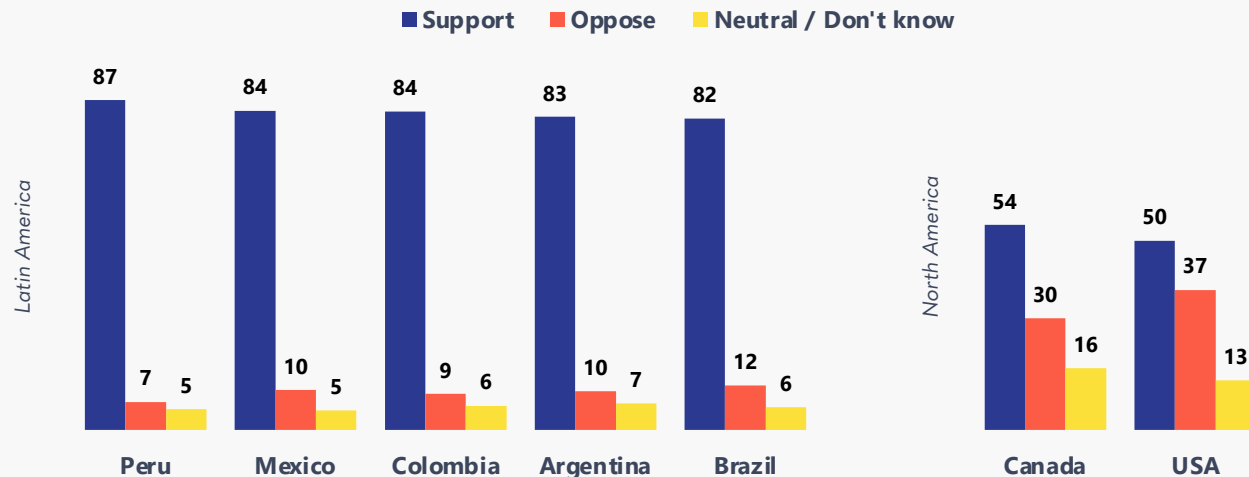
CH3. How would you feel about your government buying solar panels and wind turbines from China, provided they are cheaper and offer the same or better performance than those produced in other countries?

North America and Latin America

Consumers in Latin America show overwhelming support for their governments buying Chinese-made technologies, while around half in North America say they would support.

Level of Support for Government Buying Chinese-made Clean Technologies

"Strongly" and "Somewhat Support" (1+2) vs "Strongly" and "Somewhat Oppose" (3+4), North America and Latin America, 2025



CH3. How would you feel about your government buying solar panels and wind turbines from China, provided they are cheaper and offer the same or better performance than those produced in other countries?

Support for government purchase of Chinese-made clean technologies has been maintained or increased in all 8 countries surveyed in both 2024 and 2025.

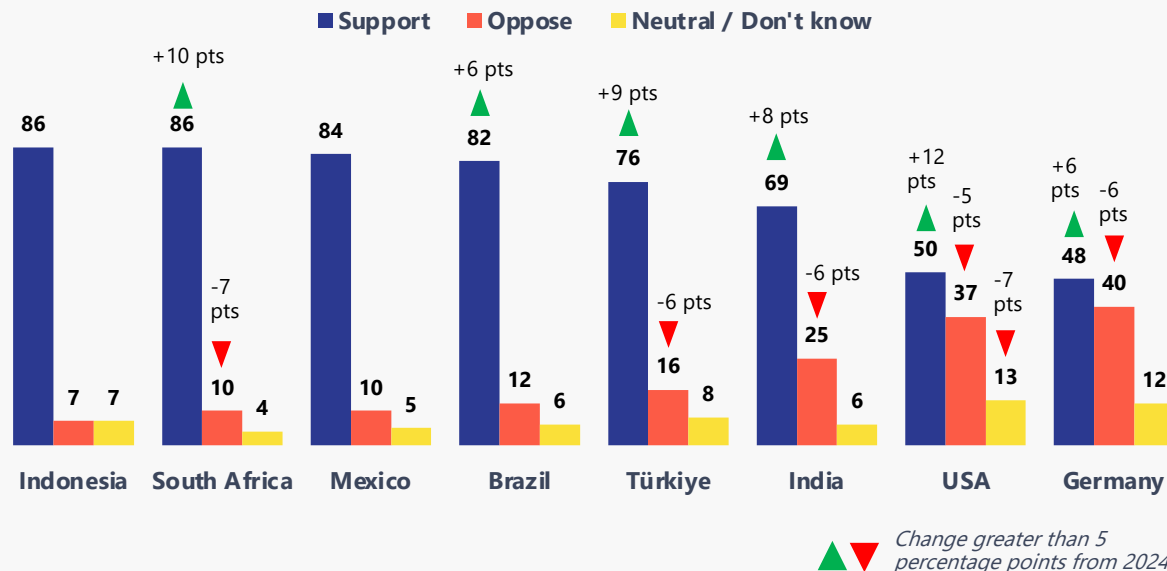
In Indonesia and Mexico, the only countries where support has not increased, it is consistently high among more than eight in ten people.

Support for governments buying Chinese-made clean technology has grown most significantly in the USA, South Africa, Türkiye, and India, in tandem with decreases in the number of people who oppose.

While support in the USA has increased, it still ranks among the lowest.

Level of Support for Government Buying Chinese-made Clean Technologies

"Strongly" and "Somewhat Support" (1+2) vs "Strongly" and "Somewhat Oppose" (3+4),
Average of Eight Markets,* 2025



*Asked only in Brazil, Germany, India, Indonesia, Mexico, South Africa, Türkiye, and the USA in 2024

CH3. How would you feel about your government buying solar panels and wind turbines from China, provided they are cheaper and offer the same or better performance than those produced in other countries



Appendix: Methodology and Research Design

Methodology Summary & Research Design

Participating Countries



Online surveying in 33 markets in July and August 2025, and 8 markets in July and August 2024 for comparison. The 2025 findings in this report are based on a survey conducted with representative online samples of approximately 1,000 adults in each of 33 countries (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in the USA) ($n=31,960$).

The design of this global online study was led by GlobeScan's senior team. The survey design supports year-over-year tracking of trends.

The survey was translated into local native languages and proofread to ensure that the content was properly and completely translated with terminology suitable to the target audience and language.

Using stratified sampling from a non-probability online panel, samples are representative of the online population and weighted to the latest census data to be nationally representative. In some developing countries, the ability to weight to be nationally representative is limited by the extent of internet penetration in some countries.

Data collection took place in July and August 2025.

Once the survey was closed, the data were downloaded, cleaned, and checked before final validation and dataset integration. This verified dataset was then used to generate statistical tables comparing results across different demographic, psychographic, and regional groupings. Multivariate analyses were conducted using SPSS software.

Regional Groupings

Throughout this report, regional groupings reference the below countries:

Sub-Saharan Africa	Kenya, Nigeria, South Africa
MENA	Egypt, Morocco, Saudi Arabia, Türkiye
Asia-Pacific	Australia, China, Hong Kong, India, Indonesia, Japan, Singapore, South Korea, Thailand, Vietnam
Europe	France, Germany, Italy, Netherlands, Poland, Portugal, Sweden, Spain, UK
Latin America	Argentina, Brazil, Colombia, Mexico, Peru
North America	Canada, USA



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