

# ***ESG in Greece: Change or Transformation?***

National Survey Results  
2025



# Research specifications

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*The survey was conducted on behalf of Applia and presented at the annual conference of Applia Hellas, under the theme 'ESG: Change or Transformation?' at the Odeon of Athens on 16 February 2026.*

Online interviews via the YouGov panel

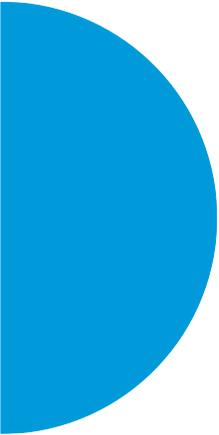
Structured questionnaire

Population: Men & Women aged 18+ Nationwide

Representative sample: 1,001 people.

Conducted: December 2025

Focus Bari is YouGov's Affiliate Partner in Greece ([www.yougov.com](http://www.yougov.com))



# Contents...



ESG: Perceptions, Values & Expectations



ESG: Trust, Consumer Choices & Consequences



ESG: Trends in Greece – Consumer typologies



# The study examined:

Views & beliefs regarding ESG across 6 key areas:

❖ Perception & awareness

*Respondents then rated statements on a 5-point agreement-disagreement scale, covering...*

❖ Environment (E)

❖ Social (S )

❖ Governance (G)

❖ ESG Influence: Corporate Image & Preference

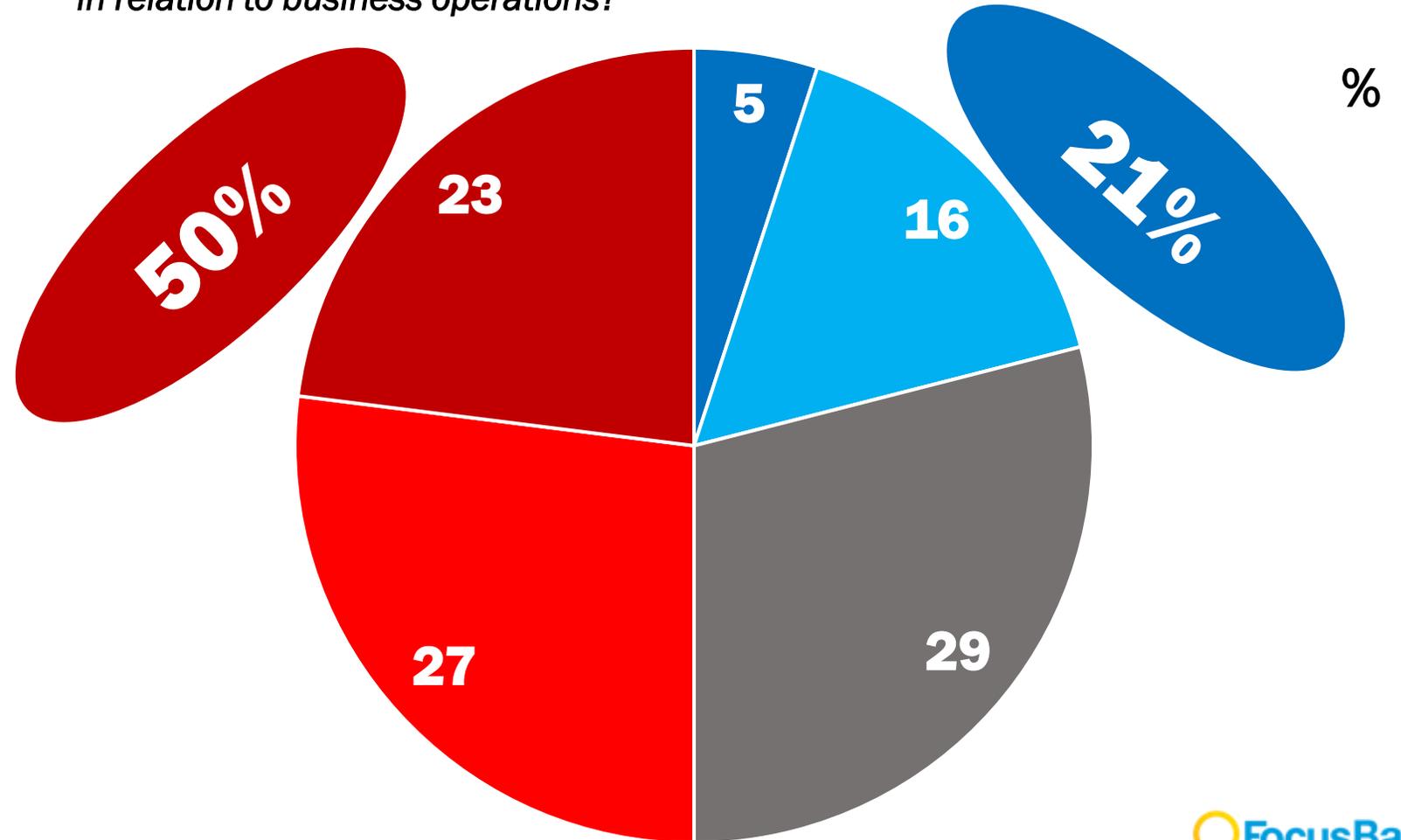
❖ Personal Beliefs, Attitudes and Values

# A. ESG: Perceptions, Values & Expectations



# ESG is not yet mainstream: Only one in five Greeks understands the term

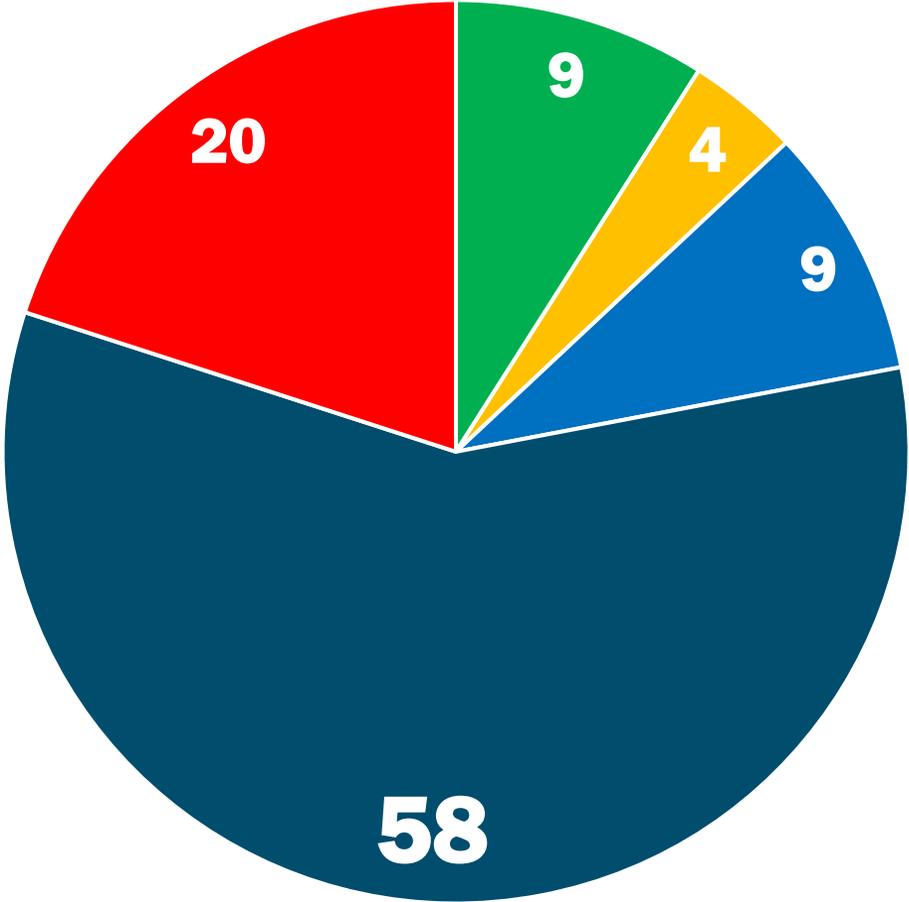
*‘How familiar or unfamiliar do you feel with the term ESG or the term Sustainability, in relation to business operations?’*



# ESG is seen as a holistic concept: Most Greeks associate it with overall corporate responsibility

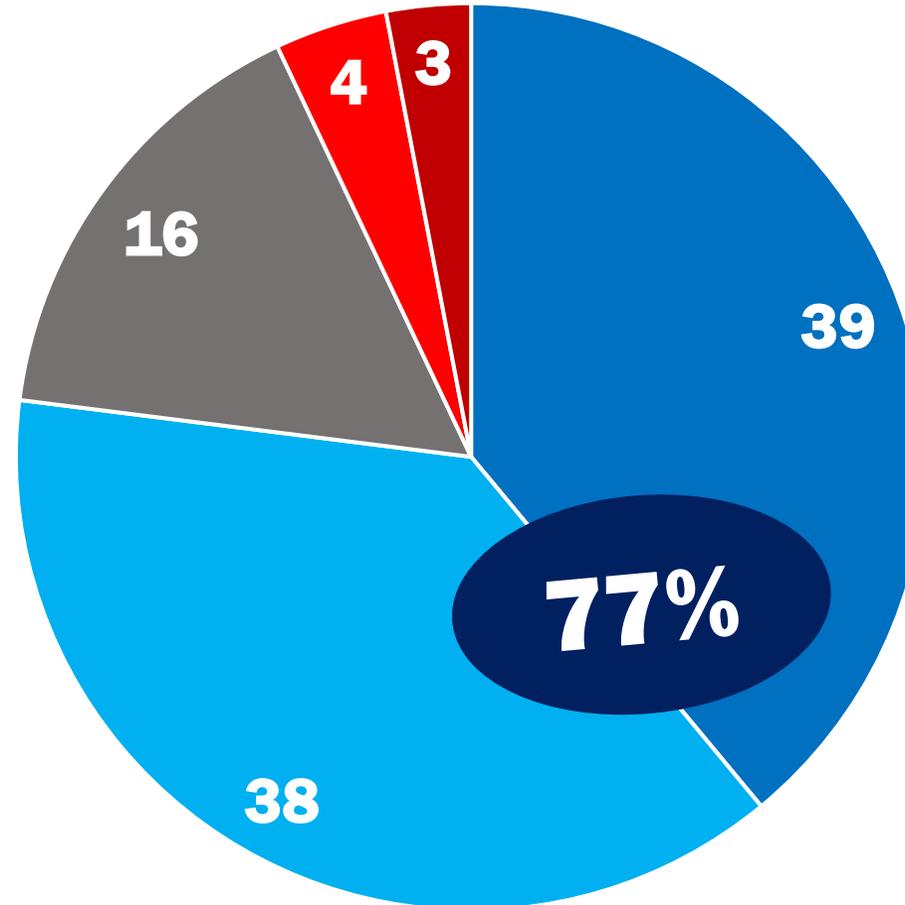
‘When you hear “ESG” or corporate sustainability, what do you think it refers to?’

%



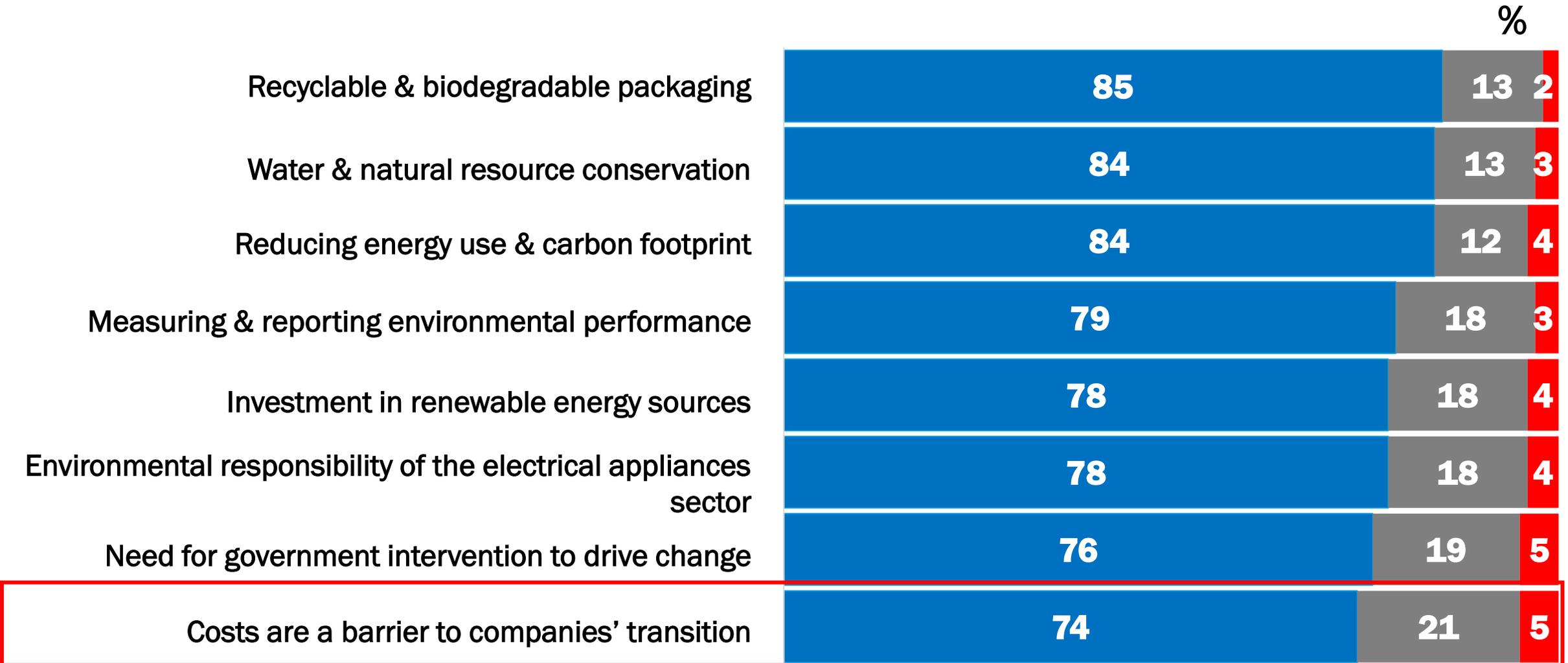
# Sustainability is intuitively seen as a requirement: More than 3 in 4 Greeks consider it important

*'How **important** do you consider it for companies/organisations to operate according to principles of sustainability and responsibility?'*



%

# Environmental ESG: Strong consensus on expectations, but transition costs remain a key barrier amid mounting pressures



■ I strongly agree/agree

■ Neither agree nor disagree

■ I strongly disagree/disagree

# Social ESG: Clear requirements

## Strong consensus – corporate responsibility is judged by actions



■ I strongly agree/agree    
 ■ Neither agree nor disagree    
 ■ I strongly disagree/disagree



*ESG no longer fits into  
'business as usual'*

# #1. Key Learning

***Although the term ESG is not yet fully understood, sustainability is already seen as a social requirement.***

***Greeks expect meaningful environmental and social action from companies – going beyond the basics, and avoiding token gestures, despite increasing financial pressures.***

***The transition requires a fundamental shift in decisions and priorities by companies as both environmental and social levels, embedding sustainability into corporate culture.***

***Today, ESG is being tested in practice, in terms of costs, everyday life and the institutional state framework.***

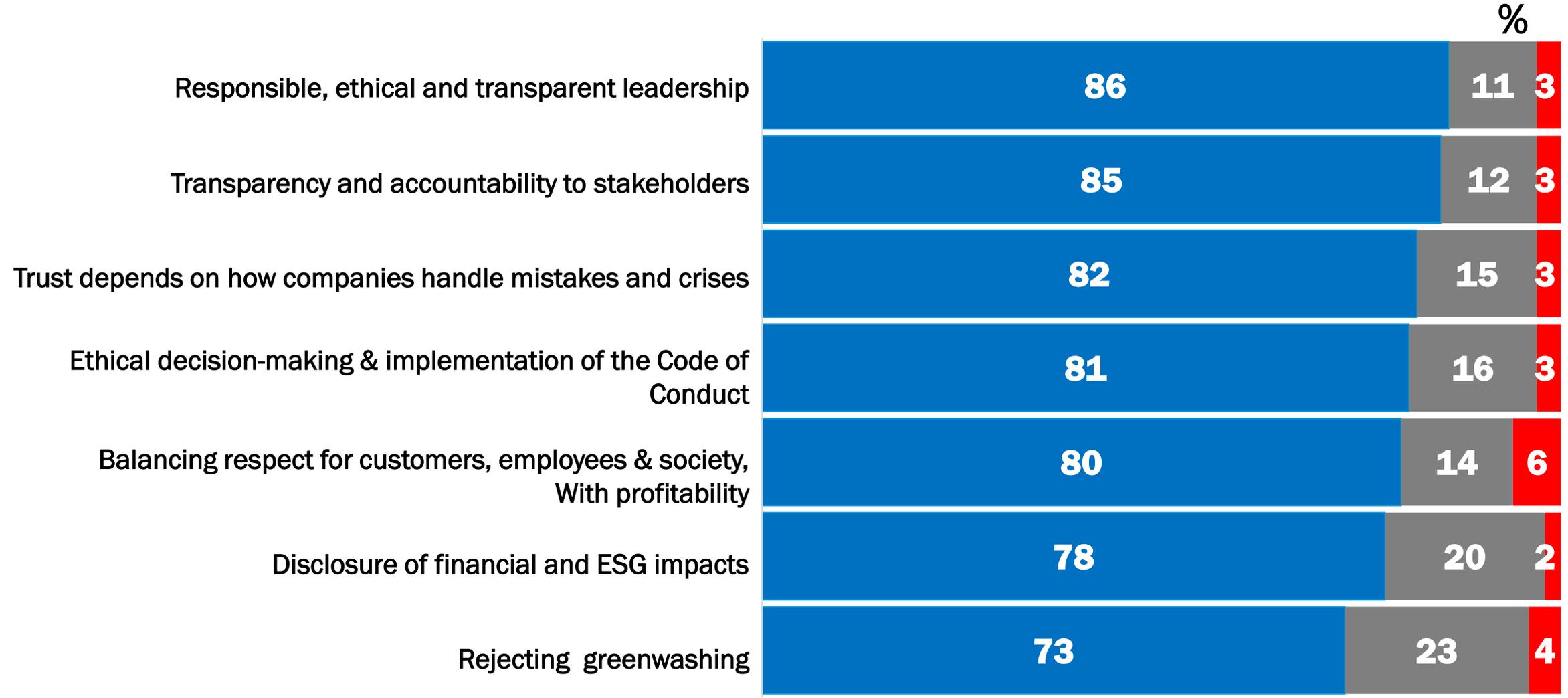
# B. ESG: Trust, Consumer choices & consequences

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# ESG Governance: Trust is not a given

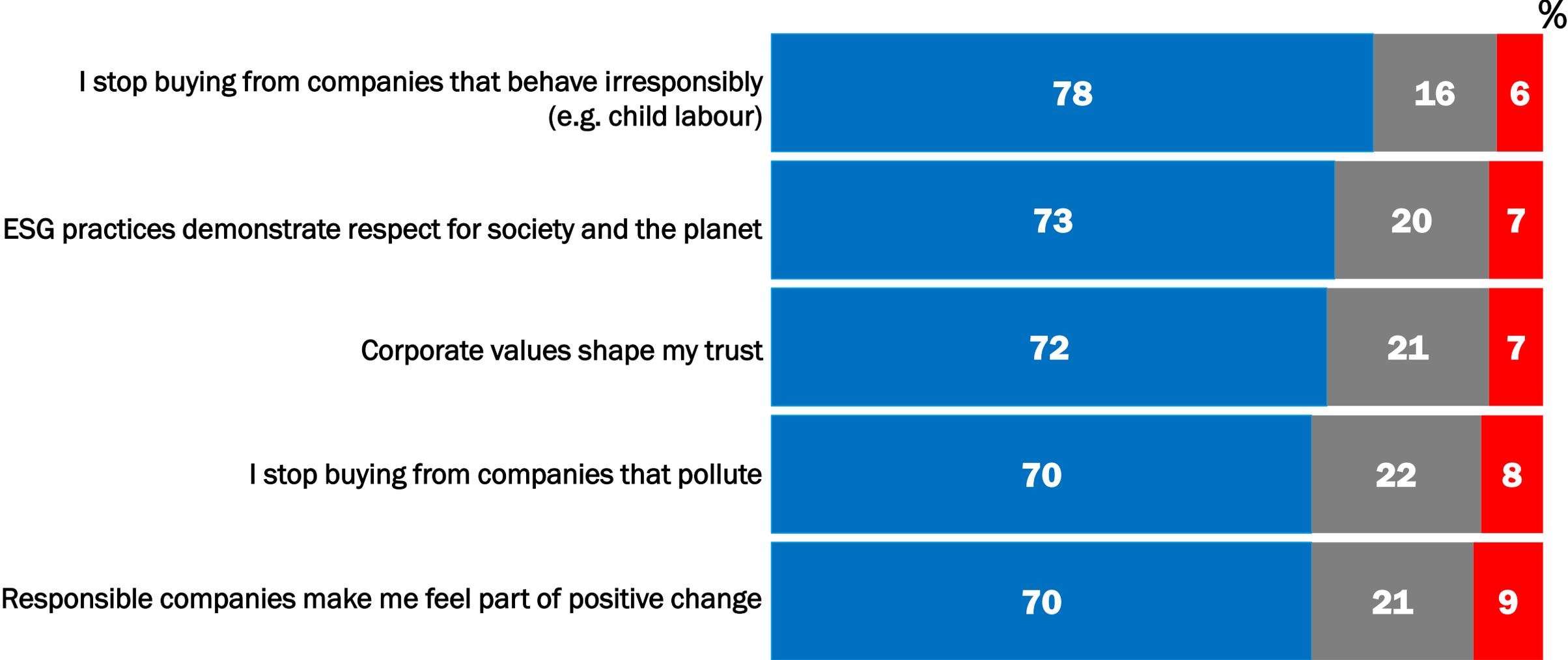
It is built on transparency, accountability and leadership decisions



■ I strongly agree/agree    ■ Neither agree nor disagree    ■ I strongly disagree/disagree

# ESG: from attitude to behaviour:

## Corporate values shape purchasing decisions



■ I strongly agree/agree   ■ Neither agree nor disagree   ■ I strongly disagree/disagree

# ESG: from attitude to behaviour

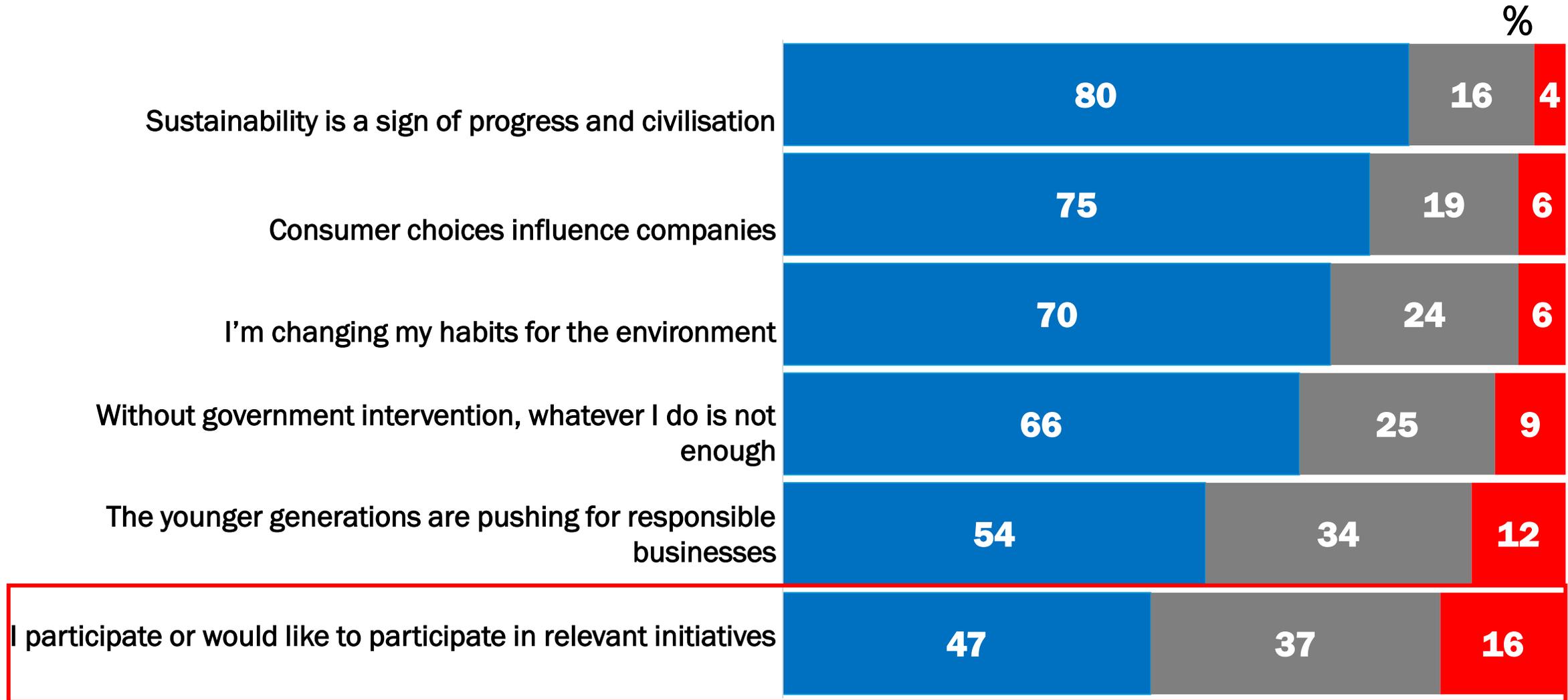
## In practice, acceptance does not always translate into action

%



■ I strongly agree/agree    ■ Neither agree nor disagree    ■ I strongly disagree/disagree

# ESG in Greece: Broad consensus, limited participation



■ I strongly agree/agree

■ Neither agree nor disagree

■ I strongly disagree/disagree

*For ESG to become a real consumer choice, companies need to transform.*

## #2. Key Learning

***Trust in ESG is not a given – it is built through transparency, accountability and consistency.***

***Corporate values shape how citizens perceive and evaluate companies.***

***However, in a context of economic pressure, positive attitude does not always translate into behaviour.***

***Today, ESG influences perception more than actual purchasing decisions, highlighting a fundamental gap between intention and action.***

## C. ESG: Trends in Greece – Consumer typologies

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**Although ESG in Greece is  
still at an early, 'embryonic' stages...**

A person is captured in mid-air, performing a jump or dance move. They are wearing a blue and white patterned outfit with long, flowing fabric that trails behind them. The background is a bright, hazy sunset or sunrise over a landscape with mountains and trees. The overall mood is dynamic and artistic.

**using  
multivariate analysis...**

# ***We have identified...***

- ❖ **Three distinct trends** in sustainability
- ❖ Life stage and background shape how people perceive ESG...
- ❖ ... revealing **three distinct profiles**

*while ESG is not fully integrated  
Into people's mindset and daily lives*

## “Values-driven profile”

### ‘ESG: Romantics’



48%

*ESG reflects the values that guide our choices.*

## “Pragmatic profile”

### “ESG: Pragmatists”



33%

*ESG needs to be ‘put into practice’ on a daily basis*

## “Disengaged profile”

### “Cynics”



19%

*I see no reason to get involved with ESG.*

# The 'ESG:Romantics': 48%



Mainly women but  
& men, aged 45+,  
with higher to postgraduate  
education

- At a mature stage of life, with a stable professional and personal trajectory
- They have embraced social and environmental developments as part of their worldview.
- They perceive ESG as a unified value system, both within corporate culture and on a personal level.
- Their choices favour companies that are actively transforming their culture through ESG practices.
- They focus primarily on the long-term value and consistency of ESG performance

***'Consciousness – Honesty – Vision'***

# The 'ESG: Pragmatists': 33%



Men and women alike,  
aged 35+, with upper-secondary  
education

- In the productive phase of life, as they establish themselves professionally and socially.
- They view **ESG** as a necessary development, but one that must be proven in practice. They approach it primarily as **a functional tool that must respond to current economic pressures.**
- They harbour reservations about the corporate approach to ESG, believing that it often remains superficial, or lacks **the maturity** required for meaningful implementation, and is largely limited **to 'the obvious'**
- *They acknowledge that their own knowledge and active engagement with ESG remain limited.*

**'Modernisation – Transparency – Action'**

# The 'Cynics': 19%

- At an exploratory stage of life, shaped by an environment of information overload, and limited ability to effectively filter information, they focus in the 'here and now'.
- They do not perceive ESG as a relevant factor in their personal or professional development.
- They believe ESG initiatives primarily serve commercial or communication purposes rather than delevering real social value.
- They appear 'convinced' of their stance and remain disengaged in ESG initiatives, believing that they 'already understand' the concept of sustainability!

A photograph of three young men standing outdoors, looking down at their smartphones. The man on the left is wearing a red and black plaid shirt over a grey t-shirt and a camouflage cap, holding a coffee cup. The man in the middle is wearing a blue t-shirt and a dark vest, looking at his phone. The man on the right is wearing a white tank top and has a tattoo on his arm, also looking at his phone.

Mainly men aged 18+,  
With secondary education

***'Convenience – Skepticism – Distance'***

# ESG: THE TRANSFORMATION

## 'ESG: Romantics'



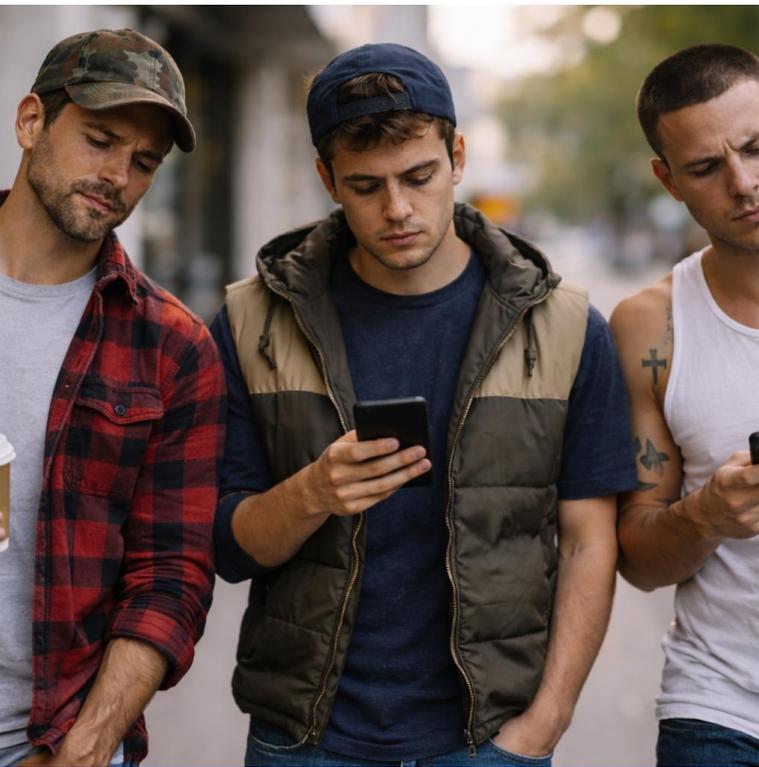
Transformation is a matter of values and identity.

## "ESG: Pragmatists"



Transformation must deliver results.

## "Cynics"



*Show me clearly what I gain from transformation.*

Without a transformation of  
corporate culture,  
ESG remains just a promise!

## #3. Key Takeaway

*The challenge for businesses is to bridge these three different trends*

*through meaningful, day-to-day practices and engagement.*

*They are called upon to respond to the needs of different audiences, transforming ESG ...*

*from a concept into a lived experience grounded in full transparency.*

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Thank you!

Want more info? Ask [xenia@focus.gr](mailto:xenia@focus.gr)

