NATION SWELL

# Social impact trend spotter

Q4 2025

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# 5 trends to follow in social impact right now

1. Food security draws mainstream attention amid government shutdown
2. AI-driven layoffs hit tech and service industries, but overall employment impact remains modest
3. Philanthropies and nonprofits are investing more in AI, but governance needs to catch up
4. Political leaders continuing pressure on corporate leadership and civil society
5. Sustainability efforts continue, but more quietly and with less accountability

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# Food security draws mainstream attention amid government shutdown

The federal government shutdown and associated SNAP funding cuts put food insecurity in the national spotlight. Companies and community organizers stepped up to support. But with policy volatility, state cost-shifting, and food inflation, more cross-sector action is needed to create long-term solutions rather than short-term stopgaps.

## Of NOTE

- Under the One Big Beautiful Bill Act of 2025 (OBBBA), states face complex trade-offs: cover billions in new SNAP costs, cut other essential programs, or end their programs.
- SNAP became a national focal point during the October - November government shutdown, during which the administration refused to use emergency funds for the program.

**During the government shutdown, some companies stepped up:**

- **DoorDash** launched an Emergency Food Response—1M free meals, 300k waived delivery fees for SNAP
- **Instacart** pledged $5M in relief and 50% grocery discounts for SNAP users
- **Albertsons** accelerated $13M in grocery gift cards.

**But long-term private sector and philanthropic action on hunger is needed:**

- NationSwell members are raising their hands on this issue: Chobani's Supermilk, PepsiCo's Food for Good, Ben and Jerry's efforts to recycle food waste into energy, and The Campbell Company's Full Futures initiative.
- CEOs, coalitions, and chambers are signaling readiness to collaborate.

2

# AI-driven layoffs hit tech and service industries, but overall employment impact remains modest

Across industries, executives are invoking artificial intelligence to justify workforce cuts. While the headlines are significant, the macro picture remains more stable and indicative of a longer-term realignment of the workforce characterized by white collar job contraction and a relatively scarcity of workers to occupy manufacturing and skilled trade positions.

## Of NOTE

Since September 2025, AI-cited layoffs have been announced by Amazon, Accenture, Lufthansa, Salesforce, Klarna, Duolingo, and more. **There's a reason**: $200B+ in corporate AI infrastructure spending is driving parallel staff cuts to maintain profit margins.

**Despite headlines, there isn't an employment apocalypse:**

- A Yale Budget Lab / Brookings analysis says that the job market is adjusting more slowly than hype suggests, more like past tech shifts than a sudden "AI apocalypse."
- Goldman Sachs expects AI to raise labor productivity ~15% but only push unemployment up by ~0.5 percentage points during the transition, with estimated displacement risk around 2.5% of current U.S. jobs under today's use cases.
- Less than 1% of U.S. service firms report AI as the primary reason for layoffs, down from 10% in 2024; 35% use AI to retrain employees and 11% have hired more as a result.
- Ford CEO Jim Farley says hiring for entry-level tech workers is down about 50% since 2019; on the other hand, the U.S. is short ~600,000 manufacturing workers and ~500,000 construction workers – the jobs needed to build AI factories and data centers.

3

# Philanthropies and nonprofits are investing more in AI, but governance needs to catch up

New evidence shows AI can streamline impact assessment and strengthen fundraising and partnership performance. Major funders are investing heavily in “AI for public good” infrastructure, while at the same time alarm bells ring on governance gaps, data ethics, and uneven capacity.

## Of NOTE

**Philanthropic investment in AI for social good is increasing:**

- In philanthropy, this year saw the launch of Humanity AI ($500 million), a pledge of $1 billion over 15 years to develop AI tools for frontline workers, and OpenAI’s $50 million fund to support NGOs.
- 91% of funders expect AI to positively transform philanthropy, CSR, and grantmaking within three years; 84% expect AI to strengthen nonprofit–corporate partnerships.

**As funding and adoption increase, more guardrails are needed:**

- 76% of NGOs report using AI in 2025 (up from 61% in 2024) and 81% of staff at grantmaking orgs are experimenting with AI, even though two-thirds of funders still lack formal AI policies or governance frameworks.
- 92% of funders worry about how AI tools might use nonprofit data; 93% say nonprofits will need staff training to ensure responsible use.
- CEP’s “AI with Purpose” and “AI Roadmap for Philanthropy in 2025” urge foundations to set AI guardrails, invest in change management, and build strong data cultures.

Despite big investments, as of October, 84% of AI-using nonprofits cite **funding for tools and talent as their biggest need**, and nearly half say AI has increased expenses.

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# Political leaders continuing pressure on corporate leadership and civil society

Political actors are increasingly intervening directly in corporate decisions on ESG, governance, and leadership, blurring the line between public power and private enterprise. Public officials are using legal threats, investigations, and federal leverage to pressure companies on personnel matters, ESG regulatory compliance, and other matters.

## Of NOTE

- In October, 16 Republican state attorneys general sent letters to Microsoft, Google, and Meta, warning them not to comply with the EU's CSRD and CSDDD and threatening lawsuits / enforcement actions.
- In September, President Trump demanded that Microsoft fire its president of global affairs due to her prior role in the Biden Justice Department.
- In September, a senior Justice Department official directed U.S. attorney's offices to draft criminal cases against the Open Society Foundations.
- After publicly pressuring Intel's CEO to resign, the administration negotiated a "historic" agreement in which the U.S. government takes ~10% equity stake in Intel.

**Political pressures moving in more than one direction:**

- In April, London Mayor Sadiq Khan blocked Accenture from a $66 million bid to overhaul the city's transit marketing strategy because it "no longer met the criteria for diversity that we expect from all suppliers" after it retired programs to keep in good standing with the Trump administration.

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# Sustainability efforts continue, but more quietly and with less accountability

Global data shows companies are largely maintaining or accelerating climate commitments while clean-energy momentum strengthens worldwide. As political pressure, regulatory complexity, and “greenhushing” rise, businesses are shifting from public pledges to quieter, systemic climate work.

## Of NOTE

- Headlines are signalling that companies are withdrawing from **public** efforts: climate pledges, alliances, and external validation of target.
- Financial-sector coalitions have effectively collapsed: NZIA formally disbanded, and NZBA paused all activities in July 2025; the U.S. Plastics Pact saw a wave of high-profile withdrawals in May 2025.
- In October, five state attorneys general sent letters to heads of the U.S. Plastics Pact, GreenBlue and the Consumer Goods Forum asserting that they could be violating federal and state antitrust laws

**Greenhushing is accelerating, but internal climate commitments are holding strong:**

- As of September 2025, 99% of CEOs are staying the course on sustainability commitments; 88% say the business case is stronger today than five years ago.
- Despite Trump’s pushback, U.S. companies increased net-zero commitments by 9% in the past year. As of September, 63% of Forbes Global 2000 companies have net-zero targets.
- A 2025 mixed-methods study of 75 major global companies found that only 13% have retreated from climate goals, while 32% have accelerated them.

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# Let’s discuss…

How are these trends resonating with your work right now?



What additional information do you need for executive and board discussions?



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# Please don’t hesitate to reach out if you have questions or feedback!

insights@nationswell.com