



Healthy & Sustainable Living

A Global Consumer
Insights Project

Highlights Report

In partnership with:



PEPSICO



CORPORATION



INTRODUCTION

The world is facing unprecedented challenges: climate change, biodiversity loss, plastic waste, rising inequality, and widespread health issues caused by unhealthy lifestyles and substandard living conditions. To meet these challenges, we urgently need new ways of living that are healthier and more sustainable.

Enabling consumers to live healthier, more sustainable lives is an enormous opportunity for brands to build trust and loyalty. Seizing this opportunity requires a strong understanding about how people think, feel, and act, as consumers and as citizens. We need to learn together, share our experiences, find ways to engage people, and innovate in ways that will make it easier for people to live in ways that are good for themselves, good for others, and good for the environment.*

GlobeScan launched the ***Healthy & Sustainable Living: A Global Consumer Insights Project*** with partners IKEA, P&G, PepsiCo, VF Corp, Visa, WWF, and others, to help companies and NGOs better understand, engage with, and mobilize consumers about healthy and sustainable living. We are grateful for this partnership and for the commitment of these organizations to help us better understand the opportunities for facilitating more healthy and sustainable living across the world.

This consumer research program, fielded in 25 countries, builds on two decades of GlobeScan's public opinion research in the areas of sustainability and expectations of global actors. It is designed to help us better understand the diverse mindsets of consumers around the world in the area of healthy and sustainable living.

Participating Countries 2019



- Online surveys of approximately 1,000 adults per country in each of 25 countries ($n=25,000$)
- Samples representative of the online population, weighted to be nationally representative in almost all countries
- Data collection took place in April and May, 2019
- See methodology section at the end of this report for further details



* To make this concept as accessible to people as possible, respondents were not asked directly about healthy and sustainable living, but instead about living in a way that is good for themselves, good for other people, and good for the environment.

The Healthy & Sustainable Living study, conducted across 25 countries, finds that people are increasingly concerned about the future of the planet and society, and that many are keenly interested in leading more healthy and sustainable lives as individuals. But there is a wide gap between intent and action, and plenty of obstacles in their way. This tension brings into focus the obligations and opportunities that face business, governments, NGOs, and other influential actors when it comes to engaging citizens and consumers in new ways of living.

1. Worldwide, concern about the environment is increasing, with majorities expressing real concern about pollution, climate change, and environmental damage. Young people are feeling the most anxiety about the state of the planet and the impacts we have on it.
2. The timing is right for engaging consumers on the topic of healthy and sustainable living, as people want to live healthier and more sustainable lives. But, by their own testimony, they need help. There is a gap between people's desire to live in healthy and sustainable ways and their current behavior.
3. Younger generations are especially expressing concern and guilt over environmental issues and have the largest gap between intent and current lifestyle. They are the most likely to look to brands to help make a positive impact in the world.
4. Healthy and sustainable living needs to be more affordable and there is a need for greater systemic support to enable more behavior change at scale. People point to cost and a lack of support from government and companies as the greatest barriers they face when it comes to living healthier and more sustainably.
5. Healthy and sustainable living has different meanings for people, but most prominent in our analysis are found to be eating healthy, shopping ethically, helping others in the community, and supporting NGOs. This suggests wide-ranging opportunities for companies, government and civil society to play a role in facilitating better ways of living across the world.

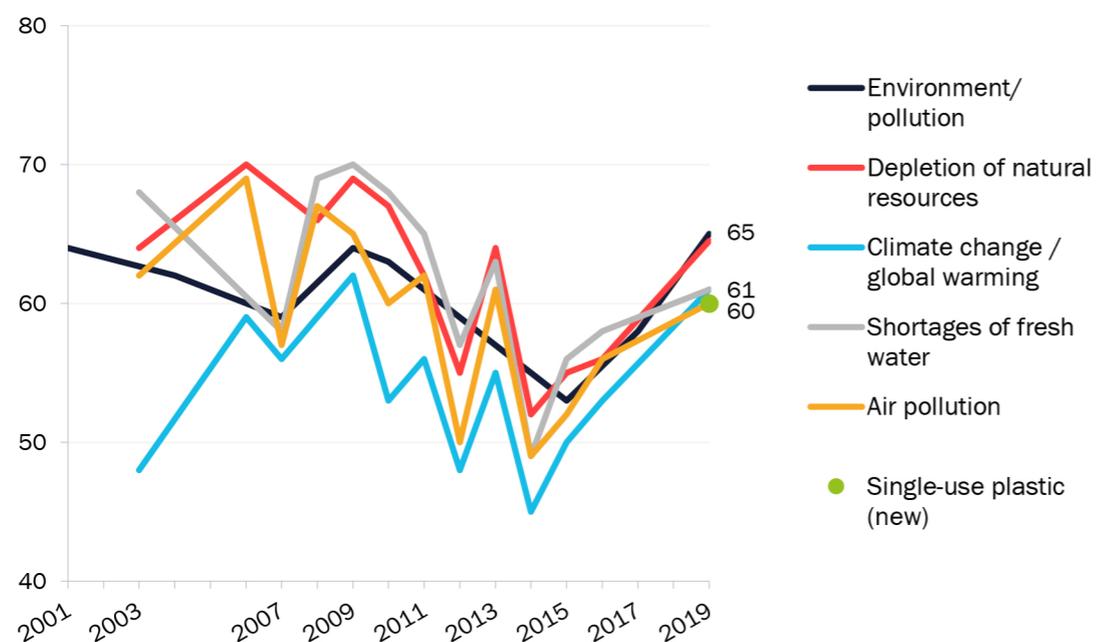
INSIGHT 1. A NEW WAVE OF ENVIRONMENTAL CONCERN

We are living in an era of widespread worry about the environment and climate change. At the same time, people are becoming less trusting of business and government to act in society’s best interest.

Public priorities are changing, and demands for action on issues like climate change and plastics pollution are growing. People across the world are increasingly worried about a range of environmental issues, including climate change, depletion of natural resources, environmental and air pollution, and single-use plastic waste—issues that are all rated as very serious by majorities across the world. Public concern across all environmental issues tracked has been growing steadily over the past five years.

Seriousness of Environmental Problems

“Very Serious,” Average of 17 Countries,* 2001–2019



*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all countries were asked in all years. This question was previously asked in GlobeScan’s Radar research programme, using an in-person and telephone methodology.

Concern about the environment is rising across the world, especially among Generation Z and Millennials, leading to the emergence of another possible green wave.

There remain significant variations in levels of concern across the world. For instance, the proportions of those saying that climate change is a “very serious” problem is highest in Mexico (85%), Philippines (80%), and Brazil (79%), and lowest in China (37%) and Russia (38%). Americans also express relatively low concern about climate change (49%) and other environmental issues compared to those in most other countries.

“I foresee that in the future with climate change there will be shortages of potable water, so I would like to get involved with doing something to save water or recycle water like support causes or inventions.”

(Female, 55-64, no children, Philippines)

“I would like to improve awareness against plastic in my country as nobody really gives a bother about using too much plastic and just throwing it away anywhere they see.”

(Male, 25-34, 2 children, Saudi Arabia)

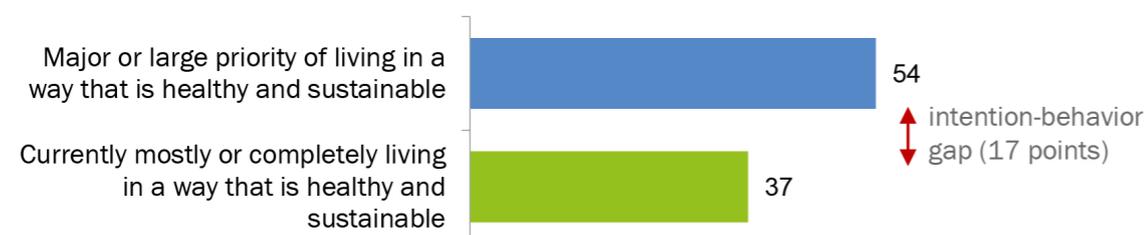
INSIGHT 2. PEOPLE WANT TO LIVE HEALTHIER AND MORE SUSTAINABLE LIVES

Closing the intention-behavior gap around healthy and sustainable living is an opportunity to not only improve environmental and social outcomes but also improve people's overall quality of life.

People around the world say it is a priority for them to live in a way that is good for themselves, good for other people, and good for the environment. However, there is a wide gap between intent and the extent to which consumers say they are living a healthy and sustainable lifestyle. This is an opportunity for actors such as government and companies to provide leadership to enable people to bridge that gap.

Assessment of One's Lifestyle

Average of 25 Countries, 2019



Consumers who say they are only living a "moderately" healthy and sustainable lifestyle present a great opportunity for companies to help them deepen their engagement. Almost half of consumers currently belong to this group. They are likely to be open to the notion of becoming healthier and more sustainable, but are not yet fully motivated.

"I would like to change the way we eat by using mostly organic vegetables, purchasing through online retailers and use mostly bicycle to travel short distances and eco-friendly vehicles to travel long distances."

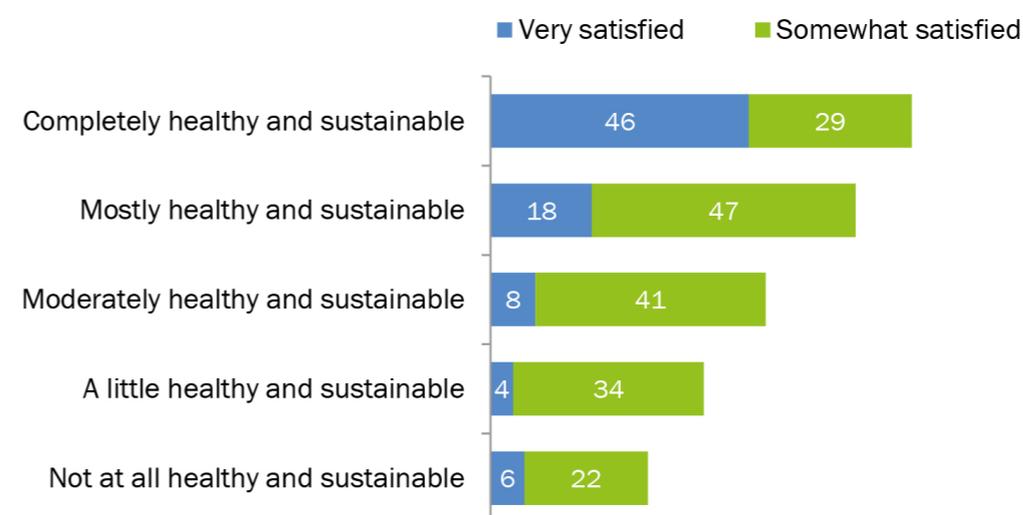
(Male, 35-44, 1 child, India)

There is a strong correlation between self-reported healthy and sustainable living and quality of life. The more people say they are actively living in healthy and sustainable ways, the higher their life satisfaction.

The strength of the correlations between healthy and sustainable behavior and life satisfaction vary across the 25 countries, with people in large Asian countries like China, India, and Indonesia showing the strongest association between being healthy and sustainable and feeling satisfied with one's life – suggesting that consumers in these large and growing markets may be particularly receptive to offerings helping them in this area. In none of the surveyed countries do we find that healthy and sustainable living leads to lower satisfaction with life.

Satisfaction With One's Life by Self-reported Healthy and Sustainable Lifestyle

Average of 25 Countries, 2019



"I would like to be able to have more influence over my own family so I can encourage our household to start using compost bins, stop buying single-use plastic bottles, stop using single-use plastic bags, support more local businesses, and convert the smaller items in our lives (toothbrushes, bins, lamps, dog food, etc.) into more environmentally friendly alternatives."

(Female, 18-24, no children, Australia)

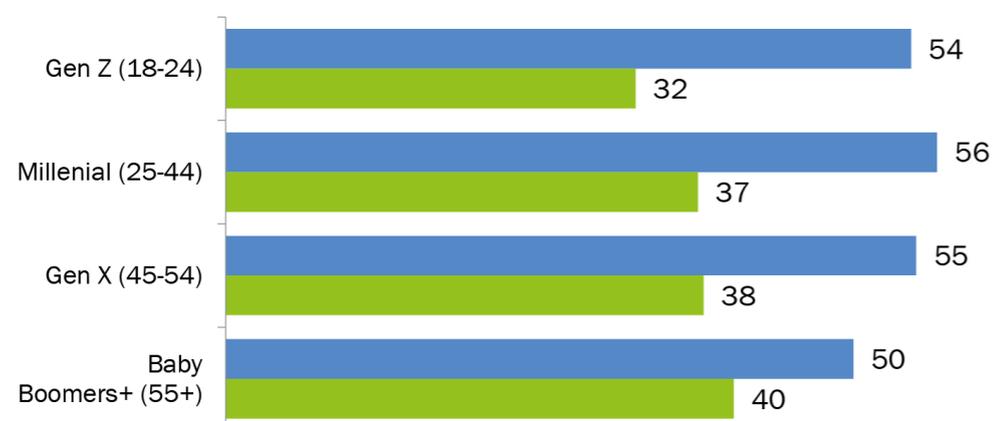
INSIGHT 3. AN OPPORTUNITY TO ENGAGE YOUNG GENERATIONS

Younger generations express the greatest need for help to live healthier and more sustainably, offering plenty of opportunity for brands to enable lifestyle changes for Generation Z, Millennials, and even a good portion of Generation X.

Younger people across all regions of the world are less likely than others to feel they are currently living a healthy and sustainable lifestyle, with Generation Z (those 18-24 years of age) consistently the least likely to say they are living in a way that is “completely” or “mostly” good for themselves, other people, and the environment. The gap between intention and current healthy and sustainable living behaviour is larger for younger generations.

Priority of Healthy and Sustainable Living vs Current Lifestyle Average of 25 Countries, 2019

- Major or large priority of living in a way that is healthy and sustainable
- Currently mostly or completely living in a way that is healthy and sustainable



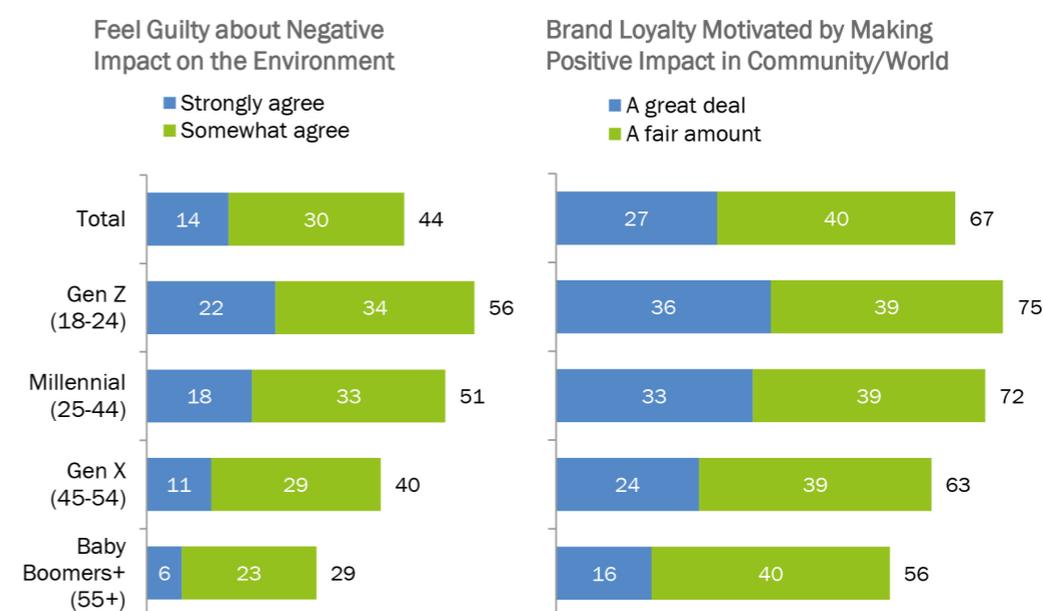
In addition to being more concerned about environmental problems and climate change than older generations, Generation Z is also the most likely to say they feel guilty about their own negative effect on the environment.

Organizations can connect with young consumers by acknowledging and addressing their anxiety and guilt around the environment, helping to make it easier for them to become healthier and more sustainable as individuals.

Although the main barrier to healthy and sustainable behavior for young people is a lack of affordable options, those in the 18–24 age bracket are also much more likely than others to say that they do not know how to make lifestyle changes, suggesting this is the demographic that is most in need of engagement.

Generation Z is also the most likely of any cohort to say that they are motivated to engage with brands that make a positive impact on their communities and the world. By showcasing a commitment to a healthier and more sustainable world, brands can deepen the loyalty of young consumers by addressing their environmental anxieties, help them live in ways they want, and demonstrate how together a better world is possible.

Guilt and Reasons for Brand Loyalty By Age, Average of 25 Countries, 2019



“Recently, I have made the switch to avoiding single-use items such as plastic straws, napkins, etc. I have stuck to this a majority of the time, but when I’m eating or cleaning something up, I notice I use an excess of napkins or towels and feel like I am wasting them.”

(Male, 18-24, no children, United States)

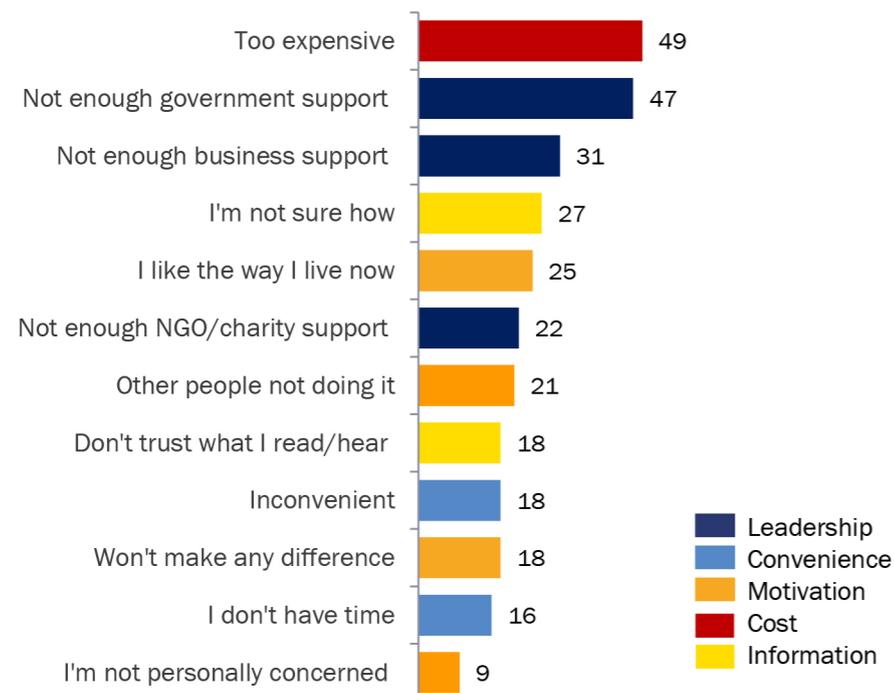
INSIGHT 4. COST, LEADERSHIP, AND INFORMATION ARE THE GREATEST BARRIERS TO HEALTHY AND SUSTAINABLE LIVING

Consumers identify a number of barriers to living in ways that are healthier and more sustainable including affordability, a lack of support from government, business, and civil society, and a lack of information on how to live differently.

Living a healthy and sustainable lifestyle is often seen as being too expensive. In many markets (including, ironically, the wealthiest ones), price is seen as the biggest factor hindering people from living as healthily and sustainably as they would like to. Premium pricing seems less and less tenable for mass-market appeal, although younger consumers in several countries, especially in Europe and North America, say they are willing to pay more for products and brands that work to improve society and the environment.

Barriers to Improving Lifestyle to be More Healthy and Sustainable

Total Mentions, Average of 25 Countries, 2019



Almost half of respondents point to inadequate support from government as a reason for not being able to live as healthily and sustainably as they would like to, emphasizing the principal role that many people expect governments to play in helping them change their behavior. A lack of government leadership is most commonly recognized as a barrier in Latin America, Africa, the Middle East, and Hong Kong, but also by a significant proportion of Europeans.

The survey results also suggest that business' current efforts in this area are insufficient. Globally, three in ten respondents say that a lack of support from companies is a barrier to healthy and sustainable living, indicating that there is a significant opportunity for them to step in.

More than one-quarter of respondents say that not knowing how to live healthier, more sustainable lives is a barrier to changing their behavior, especially among Generation Z. These results suggest there is an unmet need for government and brands to support people with more information and choices to help them shift their current behaviors.

People across the world point to a lack of support from government, business, and NGOs as significant barriers to more healthy and sustainable living, suggesting a need for greater systemic solutions.

"I would like to eat organic foods and local products/services more because I believe that will be very good for our environment, health, and economy. What limits me is money."

(Female, 25-34, 2 children, South Africa)

"I would like to see companies like shoe companies come in to collect the old shoes that fill the environment to give them a better use by recycling. It would be my pride to join hands in ensuring that shoes no longer occupy part of our environment."

(Male, 25-34, 1 child, Kenya)

INSIGHT 5. EATING HEALTHILY AND SHOPPING ETHICALLY ARE TOP DRIVERS OF HEALTHY AND SUSTAINABLE LIVING

Eating healthy food and shopping ethically are principal drivers of healthy and sustainable living. Avoiding packaging and plastics is also a core part of healthy and sustainable living, but here consumers are in need of support to live in the way they want.

Additional statistical analysis was done on the data to help understand the drivers of a sense of living a healthy and sustainable life, either consciously or subconsciously. Using regression analysis and plotting actions and attitudes on a matrix that shows the relative strength of a statistically derived connection between healthy and sustainable living and self-reported frequency of the behavior, we can see what behaviors organizations should appeal to or reinforce to advance healthy and sustainable living.

Reward: Healthy eating stands out as the type of behavior most associated with a healthy and sustainable lifestyle; exercising is also a relatively strong driver of that perception, as well as an intention to improve one's own or one's family's health and wellbeing. These are things that consumers do with relative frequency, and companies can reward this behavior to further encourage healthy and sustainable lifestyles. A willingness to buy products from socially and environmentally responsible brands, as well as supporting social or environmental campaigns and supporting companies that speak out about social and environmental issues are also relatively strongly associated with a sense of living a healthy and sustainable lifestyle.

Enable: Organizations should help consumers to avoid excessive packaging and single-use plastics, as these behaviors are relatively strong drivers of living in a way that is healthy and sustainable, yet people are not doing this as much as they might like to. Other drivers of healthy and sustainable living where consumers need more help are volunteering and helping others, eating organic food, and spending time in nature.

“I buy plastic items that can be used many times, shop using my own bag, thereby reducing the use of plastic bags.”

(Female, 35-44, no children, Indonesia)

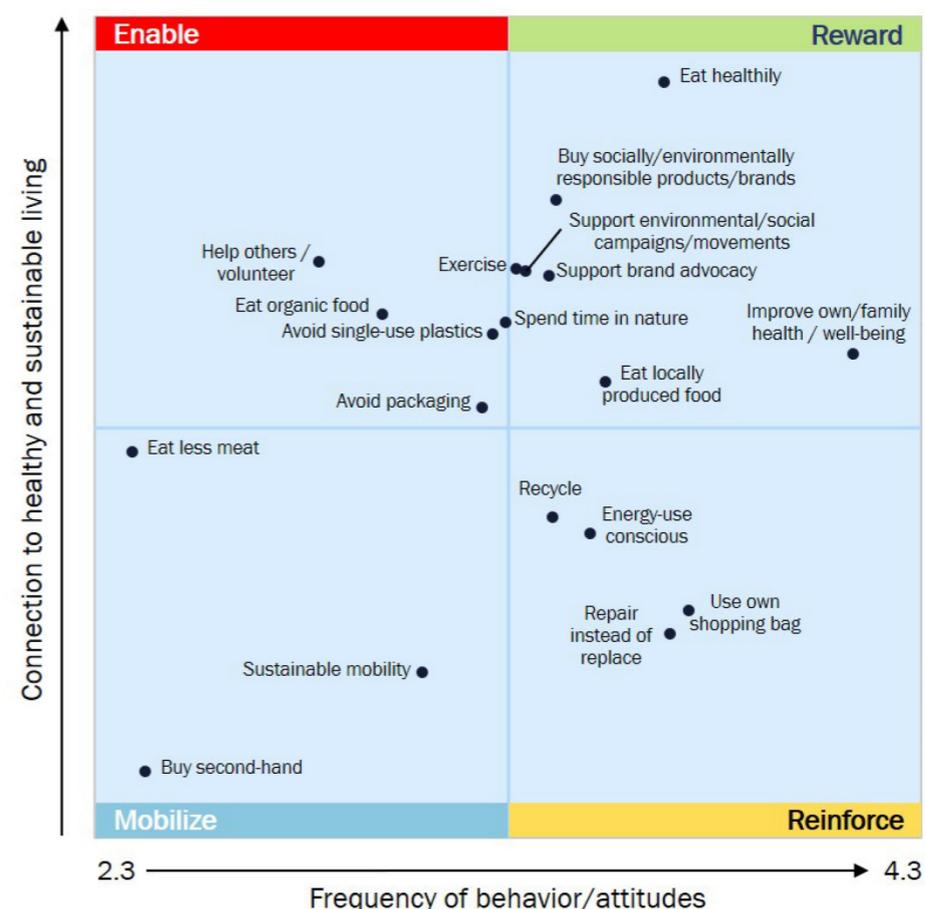
“I wouldn't buy food stored in plastic packages from a company that does not have a recycle policy. I would rather buy from a company that has an outlet where if I return the empty plastic for recycling a token is paid just to encourage me to form the habit of partaking in building a safe environment.”

(Male, 35-44, 2 children, Nigeria)

Reinforce: Consumers are already using their own shopping bags regularly, and prefer to repair products rather than replace them, and many recycle and are conscious of their energy use. These actions are currently less connected to a sense of living a healthy and sustainable lifestyle.

Mobilize: In peoples' minds today, these are habits that are less connected to living in a healthy and sustainable manner, including eating less meat, using sustainable transport, or buying pre-used items. Organizations can help with education or emotional nudges around these opportunities to connect this type of behavior to being healthy and sustainable.

Drivers of a Healthy and Sustainable Lifestyle Average of 25 Countries, 2019



APPENDIX: MAPPING HEALTHY AND SUSTAINABLE LIVING

Healthy and sustainable living means different things in different parts of the world. Engagement strategies should be geographically and culturally nuanced.

To portray the current state of healthy and sustainable living and how it varies around the world, GlobeScan developed an overall lifestyle Index of Healthy and Sustainable Living and examined it geographically.

Consumers were asked about their behavior in different areas related to healthy and sustainable living, with each individual respondent's index score then calculated based on how many actions they take, and how often they take them.

The map shows the relative frequency of self-reported healthy and sustainable living behavior as summarized by the index calculation. It portrays where people are currently living the most and least healthy, sustainable lifestyles. Behavior patterns are affected by factors such as economic development, available infrastructure, consumer preferences, and cultural dimensions.

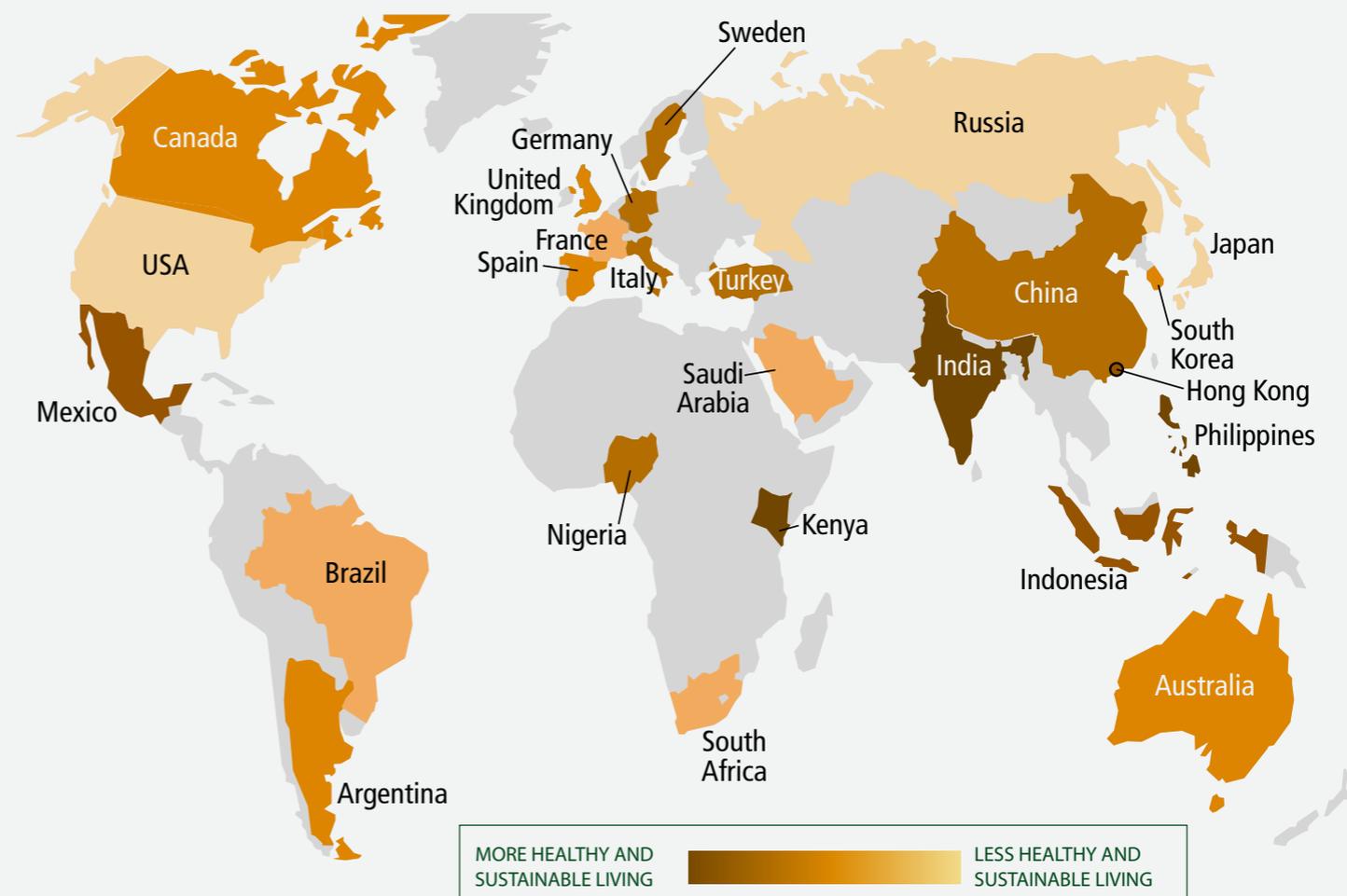
Consumers in less-wealthy countries are more likely to report behavior that may be characterized as healthy and sustainable behavior – driven by consumption levels and existing infrastructure.

Those in more developed markets tend to have access to lifestyles that are less healthy, more materialistic, and have a more negative impact on the environment.

Varying extents of infrastructural development also affect people's ability to live in ways that are healthy and sustainable. Those in less-developed countries are often at a disadvantage in terms of access to things like formal waste management facilities and infrastructure for private vehicles.

Index of Healthy and Sustainable Living

By Country, 2019



“I would like to, and I have already been doing these following things: I usually try to eat more vegetarian, use environment friendly products in my day-to-day life. I wear clothes that are environmentally friendly and planning to use electric fuel for my car one day. Besides this I do a lot of charity and volunteering in my own community as well as global.”

(Female, 35-44, no children, Indonesia)

“I am constantly implementing new habits that replace old inferior habits. I now travel only by train, public transport, and by bicycle. I no longer throw away leftovers. I only eat a vegan diet for several years. I recover everything. I buy only what I need...clothes only when needed and then it is always second hand... There are always new things to contribute big and small.”

(Female, 25-34, no children, Sweden)

METHODOLOGY

The design of this online, 25-country study (n=25,000) was led by GlobeScan and informed through consultation with participating design partner organizations. The survey design supports year-over-year tracking of emerging attitudes and consumer behavior in the area of healthy and sustainable living.

GlobeScan administered the 20-minute online survey in April and May 2019 to approximately 1,000 adults per country in each of 25 countries. The survey was conducted in native languages. In India, the Philippines, and South Africa, the survey was conducted in English.

Using stratified sampling from non-probability but managed online panels, samples are representative of the online population, and are weighted to the latest census data to be nationally representative. In some developing markets, the ability to weight to be nationally representative is limited by the extent of internet penetration (Kenya, Nigeria, and Saudi Arabia).

As in all cross-cultural surveys, the comparability of results across countries is affected by cultural response bias (different cultures tend to vary in terms of being more or less likely to agree, or to award extreme scores on either end of a scale). Per best practice in cross-cultural market research and public opinion research, data have not been standardized in order to preserve differentiation.

Respondents were not asked directly about healthy and sustainable living, but instead about living in a way that is good for themselves, good for other people, and good for the environment.

Where historical data is mentioned, this refers to long-term tracking data collected in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, the UK, and the USA. Not all countries were asked in all years.



BUILDING TRUSTED LEADERSHIP TO CREATE A BETTER FUTURE

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