



Healthy & Sustainable Living

A Global Consumer Insights Project

Highlights Report

In partnership with:



INTRODUCTION

Despite the pandemic, the evidence from the 2020 *Healthy & Sustainable Living Survey* shows that consumers around the world are willing to change their behavior to become healthier and more sustainable. However, they need support and guidance to follow through, and easy and affordable solutions are essential. Enabling consumers to live more healthy and sustainable lives is not only crucial for our collective future, but also presents a great opportunity for brands to build more trust, loyalty and advocacy among consumers.

GlobeScan's *Healthy & Sustainable Living Survey* was launched in 2019 to help companies better understand, engage, and mobilize consumers in this important yet challenging area of healthy and sustainable living. The research program builds on 20+ years of GlobeScan's public opinion and consumer research in the areas of sustainability, branding, and reputation, and is designed to help organizations better understand the diverse mindsets of consumers that shape their barriers to, and enablers of, more healthy and sustainable living .

Participating Markets

2020



- Representative online samples of approximately 1,000 adults per market in each of 27 markets ($n=27,000$)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June 2020
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.



* To make this concept as accessible to people as possible, respondents were not asked directly about healthy and sustainable living, but instead about being healthy, environmentally friendly, and helpful to others.

Across 27 markets, the *Healthy & Sustainable Living* study finds that people are eager to look after themselves and the planet. Although there is appetite to change lifestyles and behaviors, people need support in order to follow through with these changes. The findings highlight a variety of ways that organizations can engage consumers and enable the uptake of more healthy and sustainable behaviors. Key findings include:

- 1. The environment still matters:** Despite the pandemic, concern and engagement around environmental issues remain high on people's agendas. Climate change and the depletion of natural resources are as important as ever to consumers and there is a demand for systemic solutions to these challenges.
- 2. A desire to change how we live:** Consumers express a significant interest in changing their lifestyles in ways that align with health and sustainability yet find these shifts difficult to achieve. There are opportunities for organizations to step in to remove obstacles and enable consumers live better.
- 3. Easy is good:** Clear guidance and accessible options will facilitate healthy and sustainable living as people are unlikely to embrace change if they think it is difficult. When trying to be healthier and more sustainable, the easier something is perceived to be, the more interested people are in changing that behavior.
- 4. Accessibility to healthy and sustainable living is a priority:** In the context of a global recession, behavior change needs to be affordable. While consumers want to become healthier and adopt more sustainable behaviors, they are also keen to prioritize their financial health in the coming year. Consumers want companies to offer more affordable products and services that facilitate healthy and sustainable behaviors.
- 5. Gen Z are highly engaged:** There is a strong generational divide around healthy and sustainable living. Most consumers, no matter what age, want to improve their health and reduce their negative impacts on the environment. However, Gen Z are the most open to change and are the most likely to feel guilty about their behavior. Baby Boomers and older are the least environmentally conscious cohort.

INSIGHT 1. CONCERN FOR THE ENVIRONMENT REMAINS HIGH AMID GLOBAL PANDEMIC

Health issues are top of mind, but the concern about the environment is not far behind.

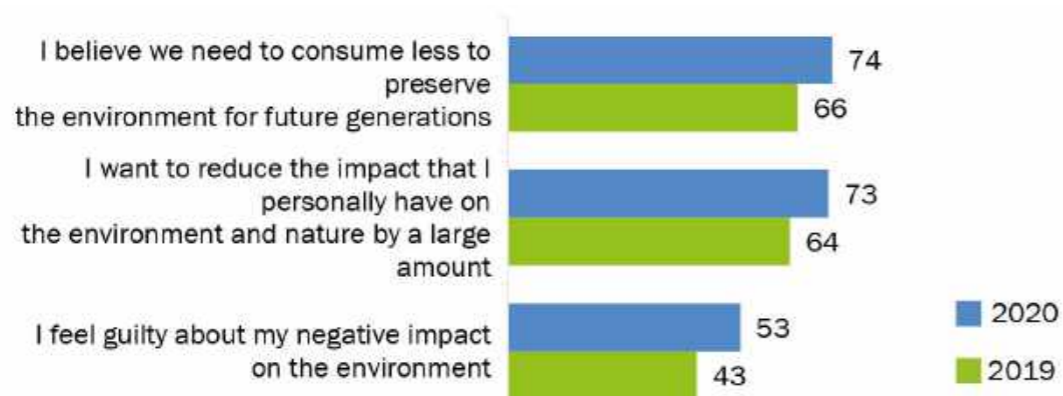
With its impacts felt across the globe, it is not surprising that people view the novel coronavirus as the most serious global problem among more than a dozen issues tested. People are also increasingly worried about issues related to the pandemic, such as the spread of human diseases and the state of the global economy.

Nevertheless, concern for the environment has not diminished. After COVID-19, people feel that the depletion of natural resources and climate change are the next most serious global issues. People increasingly want to reduce their personal impact on the environment and also continue to acknowledge a need to consume less to ensure the preservation of the planet for generations to come.

In addition, an increasing proportion of people globally are feeling a sense of guilt over their own environmental impact, with more than half now saying that they feel guilty about their negative impact.

Environmental Attitudes

"Strongly Agree" and "Somewhat Agree," Average of 24 Markets,* 2019–2020



*Does not include Singapore, Thailand, and Vietnam as tracking data unavailable.

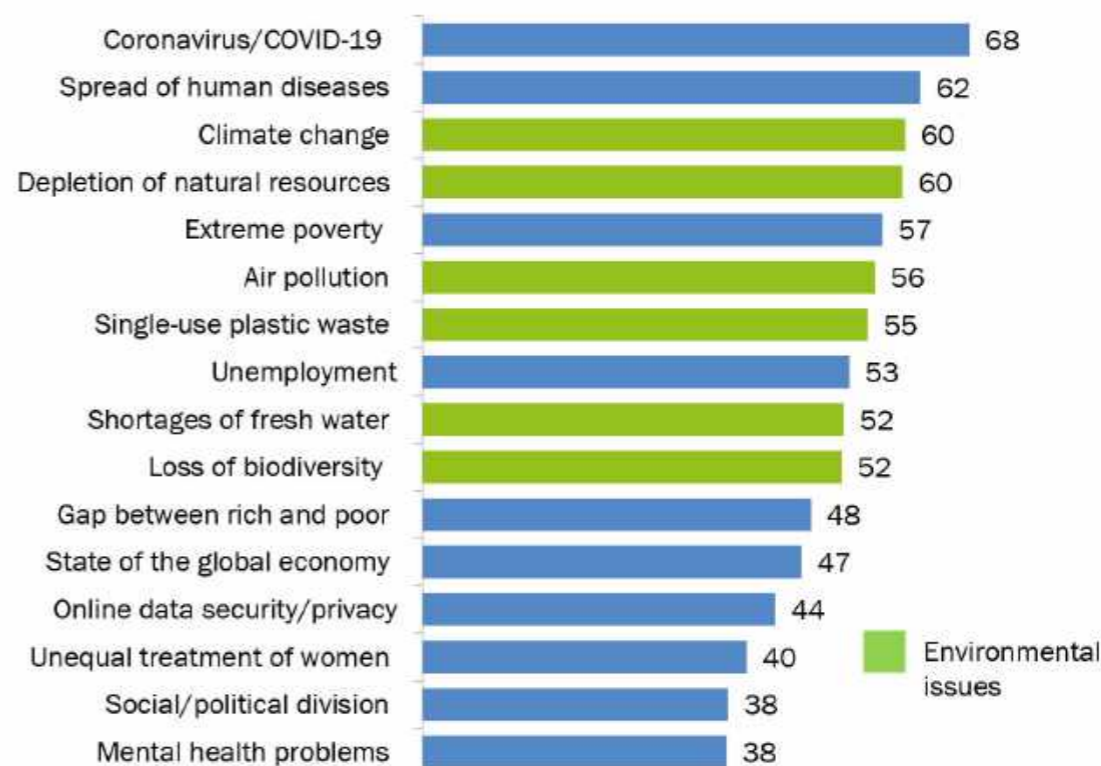
“The earth is getting hotter. The climate is erratic. And we bear the consequences.”

(Millennial, Vietnam)

Attitudes around the environment have intensified and there is appetite to do more to protect it. As economies rebuild post-pandemic, it is likely we will see a demand for a green recovery.

Seriousness of Global Problems

“Very Serious,” Average of 27 Markets, 2020



“Climate change and the impact of pollution is ruining our planet, it is making it a worse place and in recent years I have gained the awareness that my daughters, grandchildren, and future generations want to leave a cleaner planet.”

(Millennial, Italy)

INSIGHT 2. HELP IS NEEDED TO ENABLE HEALTHY AND SUSTAINABLE LIVING

People want to live healthy and sustainable lives but are not doing as much as they would like.

People across the world are looking to make changes to their lives to become healthier, more environmentally friendly, and more helpful to others. Reflecting the importance placed on health this year, becoming healthier is the area that people would like to change the most (61% want to change this aspect of their life “a great deal”). Even so, this is not at the expense of the environment – 50 percent of people say they would like to make many changes to become more environmentally friendly.

People are searching for information to help them live healthier (56%) and more environmentally friendly (47%) lives – Gen Zs and Millennials are even more likely to be looking for answers. However, few are following through by turning these aspirations into actual changes to their behavior. This suggests that people are struggling and need support and guidance.

“I am convinced that if we do not change our lifestyles and habits, we will destroy our natural resources.”

(Millennial, Mexico)

“I am interested in contributing to improving the quality of life, and also leaving a healthy planet for the next generations.”

(Millennial, Argentina)

“Everyone has individual responsibility for the future of the earth and you always have to start with yourself.”

(Gen Z, Germany)

Desire to Change vs Changes Made to Lifestyle

Average of 27 Markets, 2020



Opportunities and advice from influential actors such as government, business, and NGOs could encourage and enable people to lead better lives for themselves and for the planet.

INSIGHT 3. BEHAVIOR CHANGE NEEDS TO BE EASY

Consumers most want to make changes that will benefit both themselves and the environment.

When trying to be healthier and more sustainable, people are most likely to alter aspects of their life if they perceive it to be relatively easy to do so. This typically includes actions related to improving personal wellbeing (e.g., spending more time with friends/family), changes in the household (e.g., saving water at home), and ethical purchasing (e.g., choosing products with less packaging and buying from responsible brands).

Lifestyle changes that involve sharing with others, buying second hand, or traveling responsibly are relatively less desirable at this moment in time – perhaps unsurprisingly due to the ongoing COVID-19 pandemic. Post-pandemic, it is likely that consumers will become more interested in these activities.

Incorporating new technology into their lives, such as generating renewable energy or using electric cars, is also perceived to be a challenge. Consumers also believe new business models such as renting furniture or taking reusable containers to stores are relatively difficult to engage in. To encourage uptake, companies have an opportunity to make processes simple and accessible for consumers, with clear information and guidance.

There are a few relatively difficult lifestyle changes that consumers are interested in doing more – including improving financial health, buying products certified as responsible, and repairing products rather than discarding them. These are areas where companies can offer long-term solutions and guidance.

“When buying goods, I began to pay attention to what the packaging was made of. Finally, I began sorting the garbage and throwing away the waste separately. I installed a food chopper in the kitchen. I use more environmentally friendly fuel for my car.”

(Gen X, Russia)

“I have moderated my consumption of disposables, trying to use as little single-use material as possible.”

(Gen Z, Mexico)

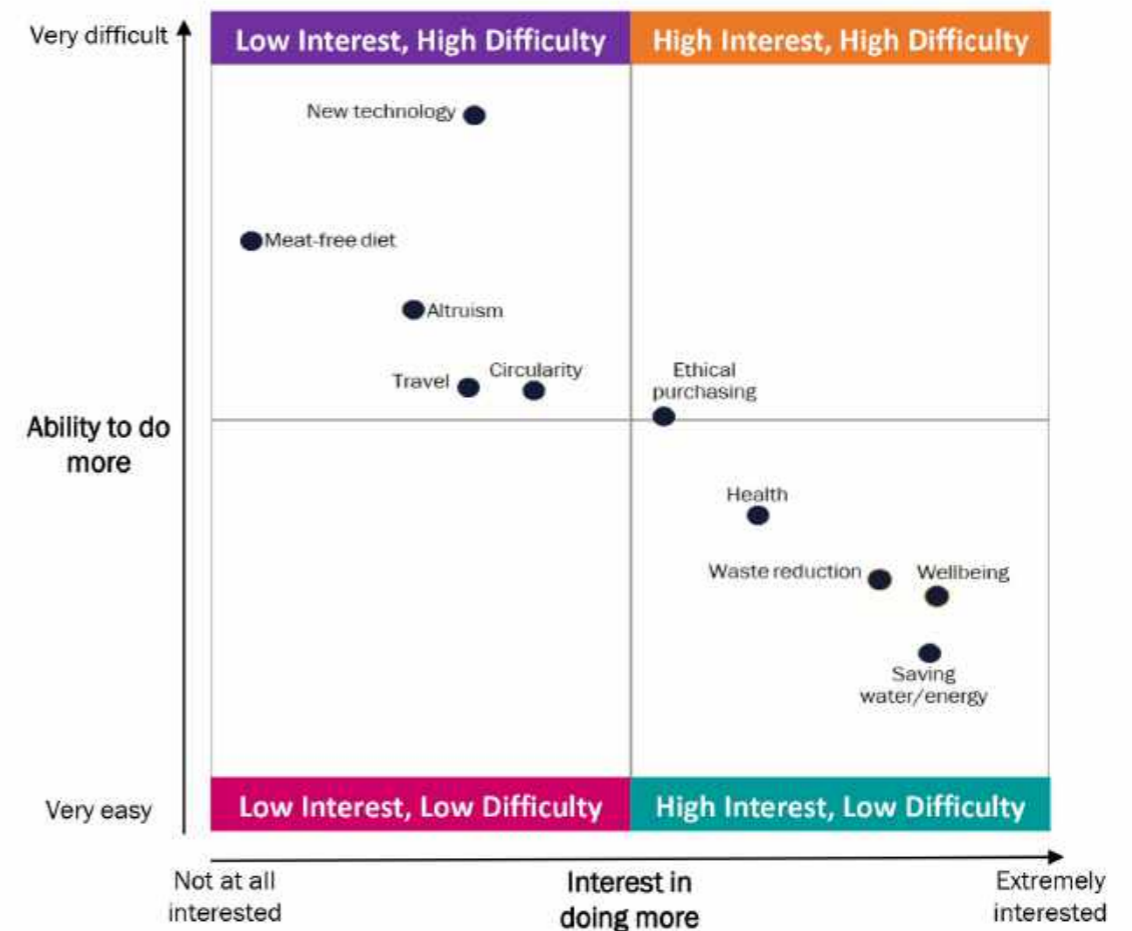
“I am recycling a lot but am struggling with drop-off points and our local municipality to collect plastic, cans, and bottles. We only have a few glass bottle bins around town.”

(Baby Boomer, South Africa)

People are unlikely to embrace change if they think it is difficult. They need proof that embracing change does not have to be complicated – providing opportunities for organizations to engage and enable.

Desire vs Difficulty to Change Behaviors

Average of 27 Markets, 2020



INSIGHT 4. HEALTHY AND SUSTAINABLE LIVING MUST BE AFFORDABLE

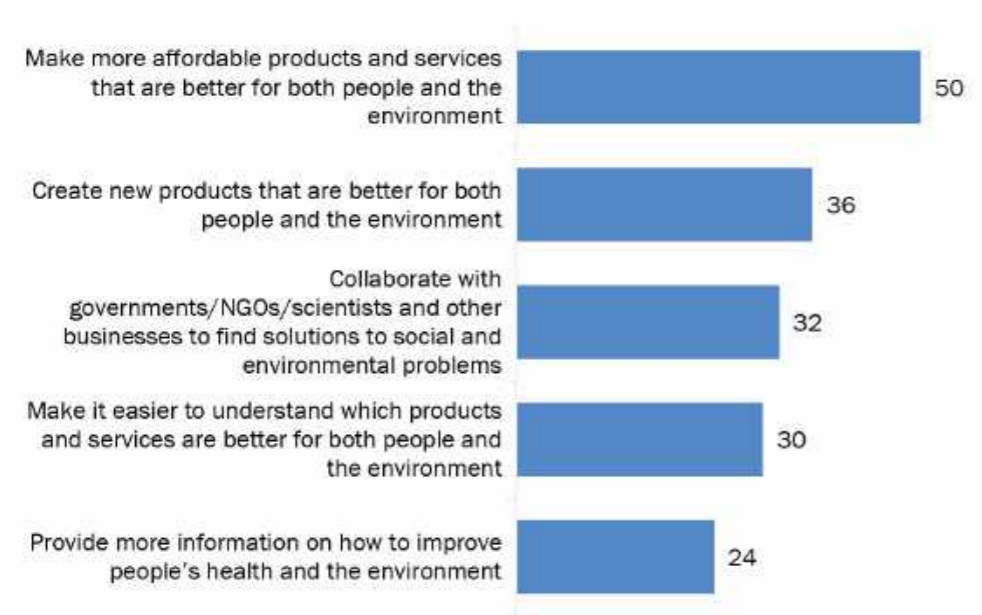
Consumers are asking for cost-effective solutions for behavior change.

When asked what companies could do to help them live healthily and sustainably, consumers most often point to affordable products and services. This is consistent across almost all markets and across all generations. While many claim they would be willing to pay more for environmentally and socially responsible brands, especially younger generations, only around one-third of consumers say they have rewarded a responsible company in the past year. This proportion has remained steady over the last two decades. While the proportion saying they have *considered* rewarding responsible companies is increasing, there is a need to convert this inclination to actual behavior change by making responsible products and services more affordable.

Reinforcing the importance of price, taking care of personal financial health is also the top action consumers would like to do more of in the coming year. With changes to income and financial stability in the wake of the pandemic, affordability is a high priority.

Preferred Company Actions to Help People and the Environment

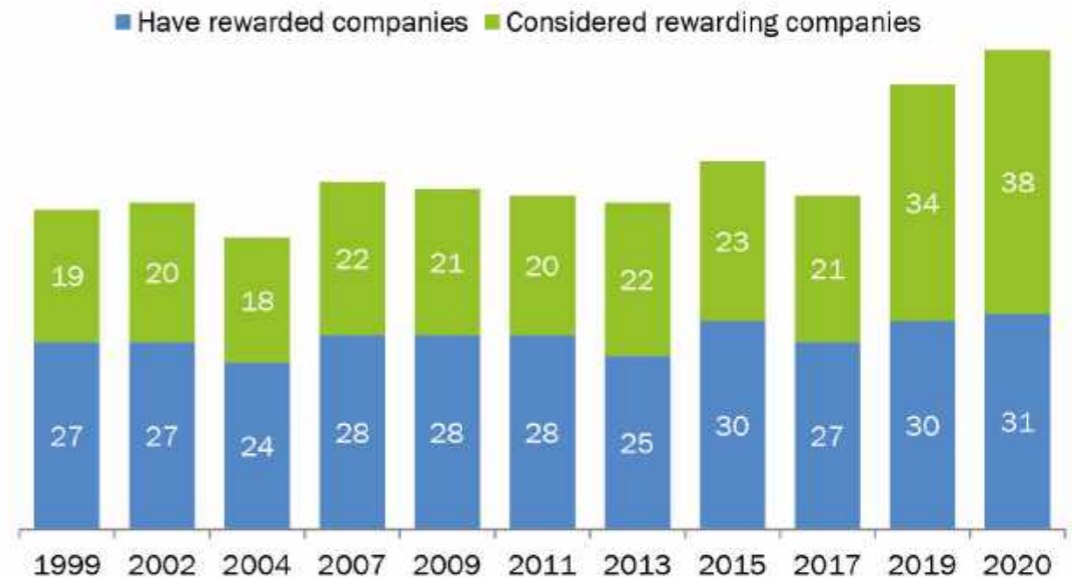
Average of 27 Markets, 2020



Consumers are often considering more responsible offerings by companies but need lower price points to convert their intentions to actual behavior change.

Rewarding Responsible Companies

Average of 16 Markets,* 1999–2020



*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all markets were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

INSIGHT 5. YOUNG PEOPLE ARE MOST OPEN TO CHANGING THEIR BEHAVIORS

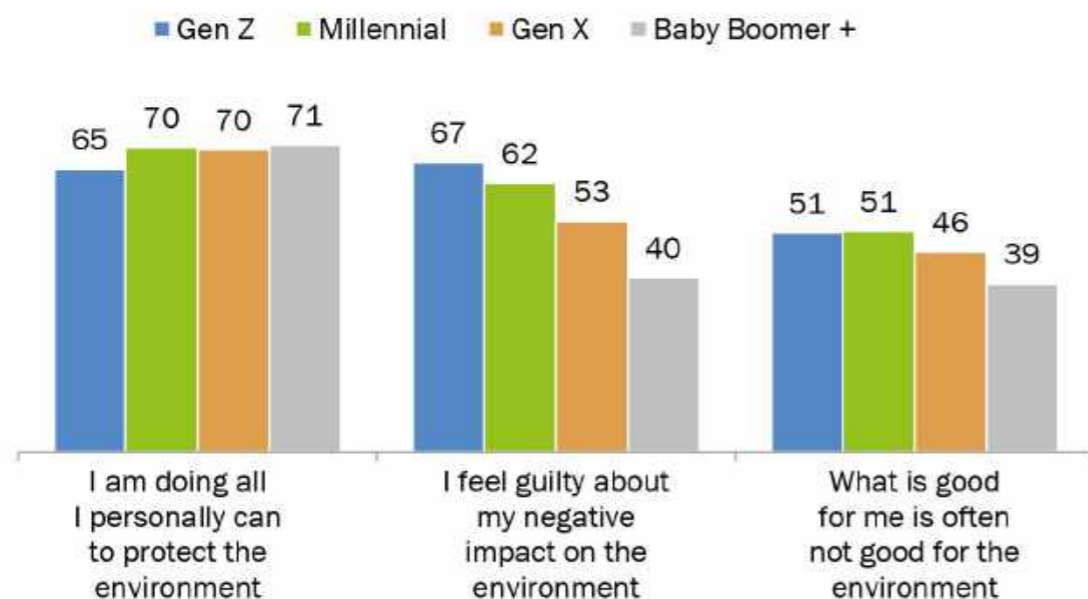
Younger generations are far more interested in changing their behaviors and are more commonly subjected to social pressure to do so.

Younger generations express significantly more interest in becoming healthier, more environmentally friendly, and being more helpful to others than those belonging to Generation X, Baby Boomers, and older. Around seven in ten Gen Z and Millennial consumers say they would like to change their lifestyle “a great deal” to become healthier, and more than half would like to do the same to become more sustainable and more altruistic.

These same generations are also more likely than older generations to claim they have made major changes to live in ways that are healthier, more environmentally friendly, and more helpful to others, although a large gap remains in all three areas between the desire to change and actions taken.

Environmental Attitudes

“Strongly Agree” and “Somewhat Agree,” Average of 27 Markets, by Generation, 2020



“Because we live in nature, we need to protect it and protect it together, which is also beneficial to physical and mental health.”

(Gen Z, China)

“A healthy life begins with a healthy environment. A healthy environment begins with an individual. And I am that individual.”

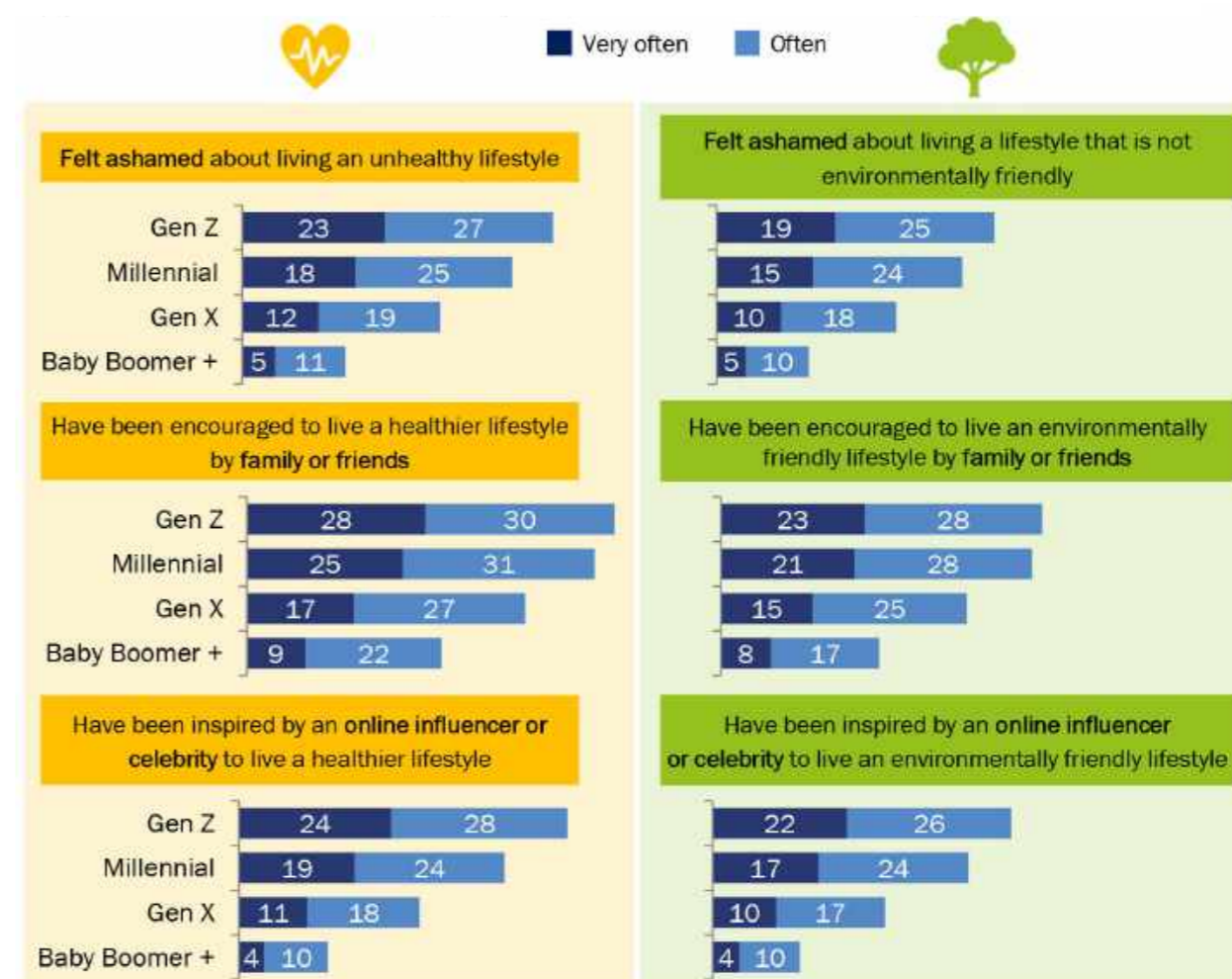
(Gen Z, Nigeria)

Perhaps being conscious of this gap, Gen Z and Millennials are the most self-critical. They believe they have the capacity to do more than what they are currently doing and are most likely to feel guilt and shame about their impact on the environment. They are also more likely to believe that what is good for them may not be good for the environment.

Younger generations are also most often subjected to social pressure to become both healthier and more sustainable. Consumers belonging to these generations are much more likely than those who are older to say that they have been encouraged by friends or family to change their behavior, or that they have been inspired by an online influencer or celebrity to do so.

Social Pressures to Be Healthier and More Environmentally Friendly

Average of 27 Markets, Done/Experienced over Past Year, by Generation, 2020



APPENDIX: MAPPING DESIRE TO CHANGE

The desire to change behaviors to become healthier and more sustainable differs across the markets surveyed, with people in emerging markets generally expressing a stronger will to change.

To portray the current desire to change behaviors for more healthy and sustainable lifestyles and how it varies around the world, GlobeScan developed a Behavior Change Index and examined it geographically.

Consumers were asked about their desire to change in different areas related to healthy and sustainable living, with each individual respondent's index score then calculated based on how many healthy and sustainable behaviors consumers want to do more of.

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

People in less developed markets tend to be more eager to do more behaviors that are healthy and sustainable, reflecting generally higher levels of concern about the environment and more widespread feelings of personal guilt about one's own impact compared to more developed markets. In contrast, people in places like Japan, Sweden, or Australia are among the least open to doing more healthy and sustainable behaviors.

HSL Behavior Change Index

By Market, 2020



“I pay more attention to recycling and I am trying to get more recyclable things. I never get more than I need.”

(Gen Z, Turkey)

“Eat healthier, include veggies and fruits. Recycle and reuse items if possible. Use less water. Exercise more regularly.”

(Gen Z, Singapore)

“I have tried to stop eating meat. I choose not to use bags or plastics and I go to places where they promote environmental consciousness. I don't buy products made from animals, like fur. I recycle, compost with residues of fruits and vegetables.”

(Millennial, Argentina)

METHODOLOGY

The design of this online, 27-market study ($n=27,000$ weighted) was led by GlobeScan's senior team 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 June 2020 to approximately 1,000 adults per market in each of 27 markets. The survey was conducted in native languages. In India, Kenya, Nigeria, 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 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 (e.g., Kenya, Nigeria, Saudi Arabia, and Vietnam).

As in all cross-cultural surveys, the comparability of results across markets 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 the scale). Per best practice in cross-cultural market research and public opinion research, data have not been standardized in order to preserve differentiation. In some cases, data are best interpreted by rank-order findings among markets.

Where historical data are shown, before 2019 questions were asked as part of GlobeScan's Radar research programme using in-person and telephone modes. As the research methodology was different, comparisons between current and previous results are indicative.

Respondents were not asked directly about healthy and sustainable living, but instead about being healthy, environmentally friendly, and helpful to others.



BUILDING TRUSTED LEADERSHIP TO CREATE A BETTER FUTURE

GlobeScan is an insights and strategy firm that helps companies, NGOs, and governmental organizations build the trust they need to create enduring value for themselves and for society.

www.globescan.com