GlobeScan

Healthy & Sustainable Living

Global Consumer Insights

2021 Highlights Report

In partnership with:

akatu

CVS Health

IKEA

LEVI STRAUSS & CO.

PEPSICO

reckitt

NYU STERN Center for Sustainable Business

VISA

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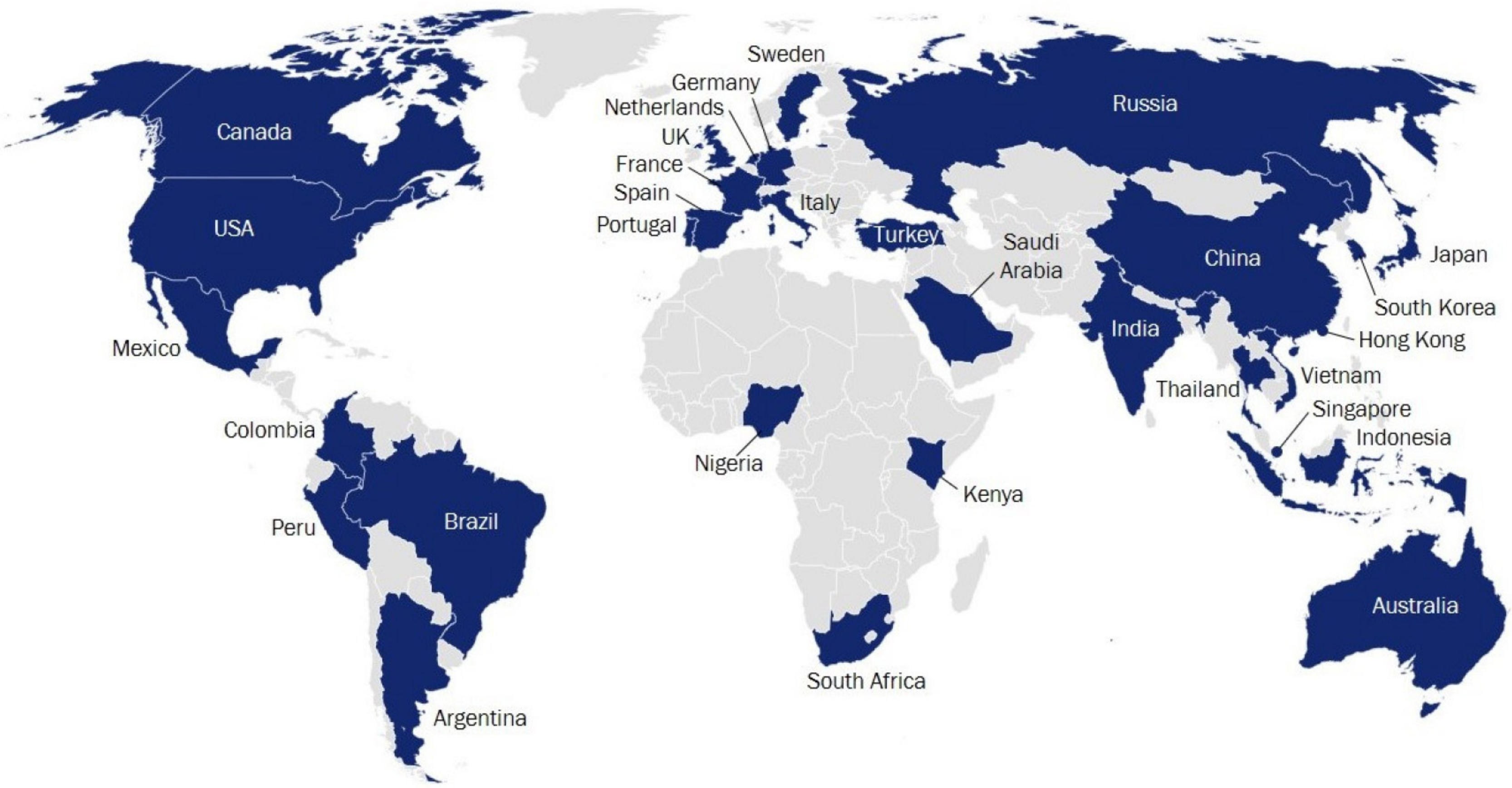
INTRODUCTION AND METHODOLOGY

Enabling consumers to live more healthy and sustainable lives is not only crucial for our collective future, but also an enormous opportunity for brands to build more trust, loyalty, and engagement with consumers.

The *Healthy & Sustainable Living: A Global Consumer Insights Project* was launched in 2019 to help companies better understand, engage, and mobilize consumers in this exciting yet challenging area of consumer engagement in sustainability. The research program builds on 20+ years of GlobeScan's public opinion 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.

The 2021 study is the largest yet including over 30,000 interviews across 31 markets. It tracks a number of findings over time to understand shifting trends and explores new topics to keep up with the evolving agenda. The research was designed with and supported by a set of committed partners: Akatu Institute, CVS Health, IKEA, Levi Strauss & Co., NYU Stern Center for Sustainable Business, PepsiCo, Reckitt, Visa, and WWF International.



** 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.*

- Representative samples of 1,000 adults were surveyed in each of the 31 markets (*n*=30,352)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June and July 2021
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.

KEY INSIGHTS

1. **Growing urgency and opportunity.** There has never been a better time to engage consumers on healthy and sustainable living. People around the world care more than ever about a range of environmental issues – water, resource use, climate, air, and biodiversity – and intensified environmental consciousness during the pandemic has been locked in.

2. **The aspiration-action gap lingers.** Consumers express a strong desire to make changes to the way they live, especially younger generations. Yet there remains a large aspiration-action gap when it comes to sustainable living. Brands have an opportunity to close this gap by focusing on those life-changing moments when openness to living more sustainably are most acute such as marriage, having a family, moving house, or graduating from university.

3. **From "me" to "we."** Global tracking shows there is far too little behavior change taking place, although American consumers are showing strong shifts in sustainable behaviors over the past few years. Large proportions of consumers already say that they are "doing everything they can." In addition to making sustainable living more affordable, consumers indicate they need support from a host of actors to facilitate healthy and sustainable living, looking specifically to governments and companies to create a more enabling social infrastructure for behavior change at scale.

4. **Brands can inspire.** The findings show that consumers most connect to healthy and sustainable living through the marketplace. Consumers are much more likely to associate a healthy and sustainable lifestyle with choosing or avoiding brands that reflect their values than everyday actions such as recycling or waste reduction. Responsible shopping is a potential gateway to inspire more sustainable living, and companies have the opportunity to empower consumers to broader sustainability action through the marketplace.

5. **Toward a sustainable future.** Results suggest that we will pivot toward more sustainable habits, as young people are more eager to change their behaviors and many people of all generations look forward to becoming more healthy and living sustainably when imagining a post-pandemic future. When asked about their family's life once the pandemic is over, many say they want to adopt more sustainable habits and consume less, as well as making more of their purchases from responsible companies.

INSIGHT 1: GROWING URGENCY AND OPPORTUNITY

With worries about environmental issues at an all-time high and a growing consciousness and direct experience of climate change, consumers have never been more receptive to actions and engagement around sustainability.

Although concern about the global pandemic remains the most pressing issue overall, people around the globe have never been more concerned about water, natural resource depletion, climate change, and nature, with concern levels trailing closely behind that of COVID-19. Substantial and growing proportions feel they have been greatly personally affected by climate change, while fewer have felt greatly impacted by the economic recession compared to 2020.

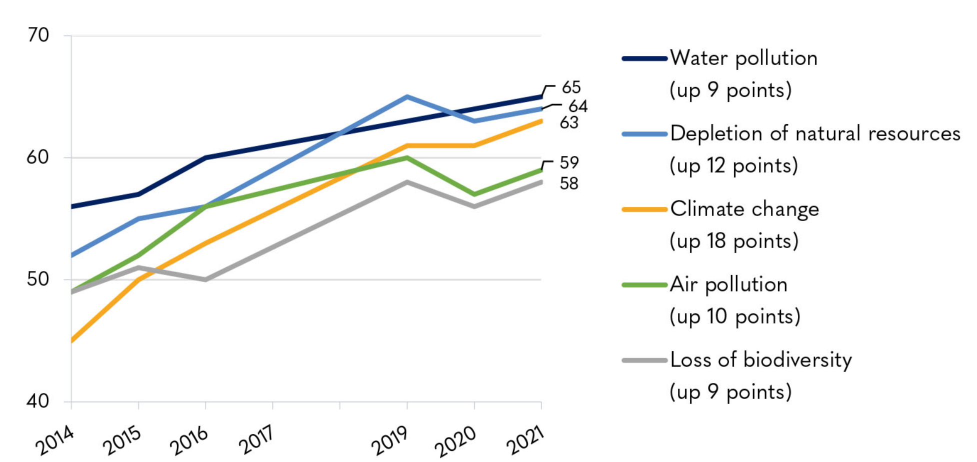
The heightened sensibilities around sustainability that were recorded in 2020 have also held steady more than one year into the global pandemic, with most consumers continuing to express a desire to reduce their personal impact on the environment and continuing to acknowledge a need to consume less to ensure the preservation of the planet for generations to come. More than half of consumers also feel a sense of guilt over their own environmental impact, with younger people feeling significantly more guilty than those who are older.

Most consumers also continue to claim that they would be willing to pay a premium for products that are socially and environmentally responsible, underlining the aspiration that many consumers have to consume more in line with their heightened environmental and social consciousness.

People in almost all markets surveyed say that they feel more personally affected by climate change than one year ago.

PERCEIVED SERIOUSNESS OF ENVIRONMENTAL PROBLEMS

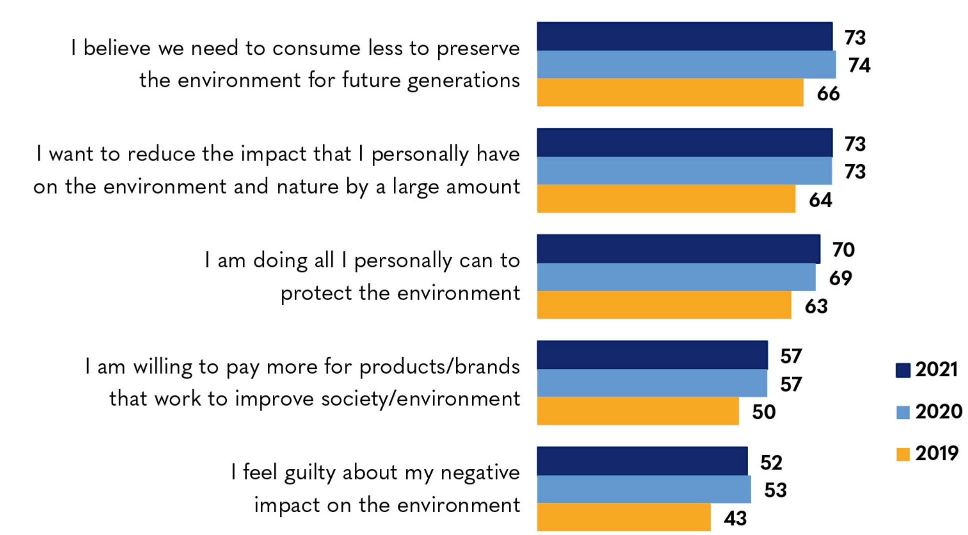
"VERY SERIOUS," AVERAGE OF 17 MARKETS,* 2014–2021



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

SHIFTING ENVIRONMENTAL ATTITUDES

"STRONGLY" AND "SOMEWHAT AGREE," AVERAGE OF 24 MARKETS, * 2019–2021



*For consistent tracking, this chart does not include Colombia, Netherlands, Peru, Portugal, Singapore, Thailand, and Vietnam, as these markets were not surveyed in 2019.

INSIGHT 2: THE ASPIRATION-ACTION GAP LINGERS

Consumers continue to say that they would like to make significant changes to become healthier and more sustainable, but the gap between aspirations and action persists.

Aspirations to greatly change lifestyles for the better are particularly strong globally among younger consumers. Women across the 31 markets surveyed also express stronger aspirations for both healthier and more environmentally friendly habits than do men. Those who describe themselves as minorities, including minority ethnic/racial groups, religious minorities, LGBTQI+, and other unspecified minority groups also demonstrate a significantly stronger desire than others to improve their lives to be healthier and more sustainable. Consumers in emerging markets are also significantly more likely to say they want to change their lifestyles.

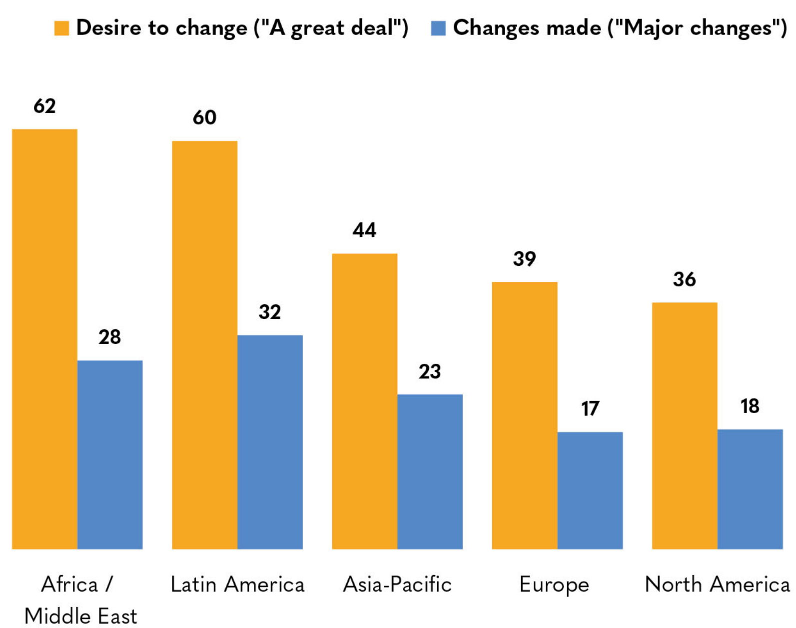
Despite a strong desire to make significant changes, relatively few people are able to fully follow through; a much smaller proportion wanting to make lifestyle changes say they have actually done so. This aspiration-action gap is especially large in developing countries and for Gen Z.

The research shows that people around the world are more open to making changes in healthy and sustainable living after having gone through an important life event like getting married or having a baby. Those having gone through such life changes show a stronger desire to change their habits, suggesting brands engage with consumers on sustainability across a range of key moments in their lives.

> **Those who have had a baby in the past year are much more likely than others to say they want to live more sustainably.**

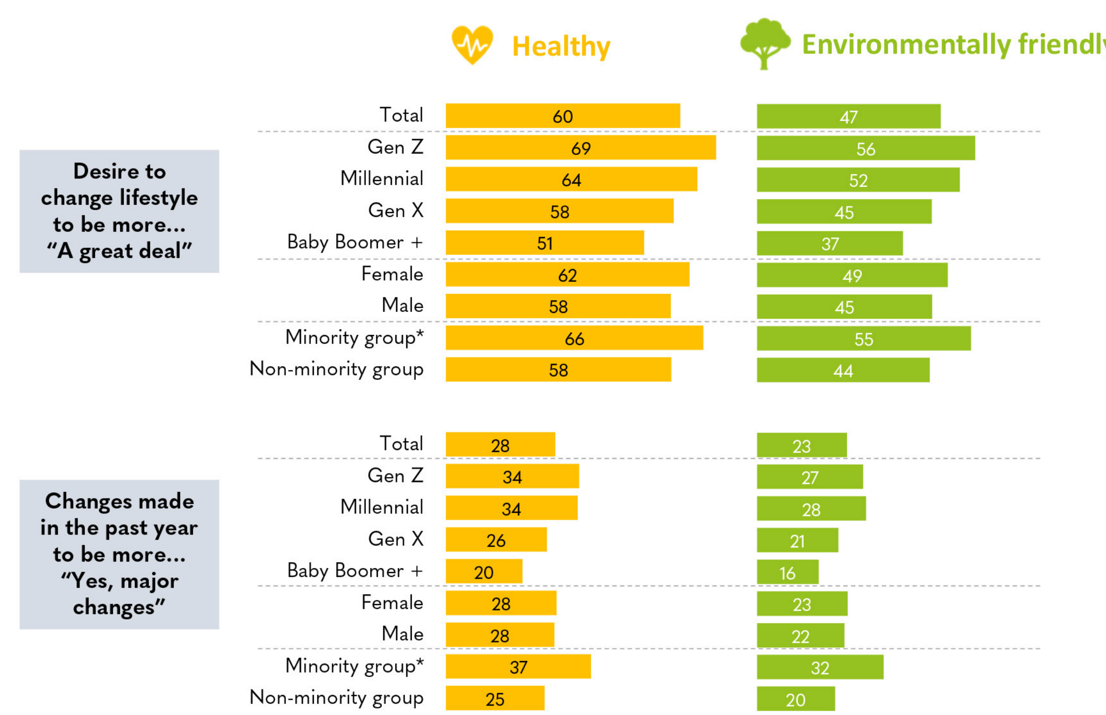
DESIRE TO CHANGE VS CHANGES MADE TO LIFESTYLE TO BE MORE SUSTAINABLE

BY REGION, 2021



DESIRE TO CHANGE VS CHANGES MADE TO LIFESTYLE

AVERAGE OF 31 MARKETS, BY DEMOGRAPHICS, 2021



*Minority groups include minority ethnic/racial group, religious minority, LGBTQI+, and "another minority group."

INSIGHT 3: FROM "ME" TO "WE"

Support is needed from a range of actors – especially governments and companies – to facilitate behavior change at scale.

Despite strong intentions to do better, results from this year's study show only marginal improvements in some areas of healthy and sustainable living, including energy savings, waste prevention, conscious consumption, wellbeing, sustainable mobility, altruism, and vegetarianism. Encouragingly, consumers in the three markets with the lowest performance scores on an index of healthy and sustainable living behaviors, the USA, Japan, and Russia, all show some improvement compared to 2019. There have also been significant improvements in many markets with consumers turning more to plant-based alternatives, especially in the USA, the UK, Germany, France, Italy, Spain, and Saudi Arabia.

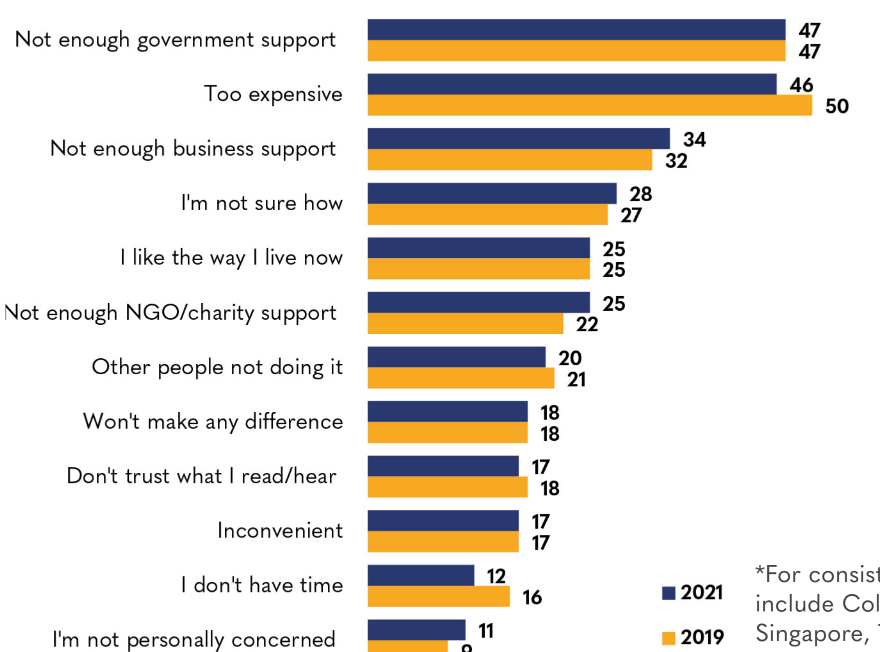
The lack of movement in consumers' sustainable behaviors, despite high levels of concern about climate change and nature, can be explained by a range of factors. When asked what is preventing them from doing more to live healthy and sustainable lifestyles, people tend to look for greater support from governments, brands, and civil society to help facilitate changes in behavior.

Affordability also remains a significant barrier for greater lifestyle changes, although perceptions of healthy and sustainable lifestyles being too expensive have decreased in several markets over the past two years. Nevertheless, affordability and access to information continue to be important to ensure equal access and mainstreaming of healthy and sustainable living, with both governments and companies playing key roles in driving systemic change.

Consumers want to change their behaviors but many feel that governments and companies are not doing their part to make it happen.

BARRIERS TO IMPROVING LIFESTYLE TO BE HEALTHIER AND MORE SUSTAINABLE

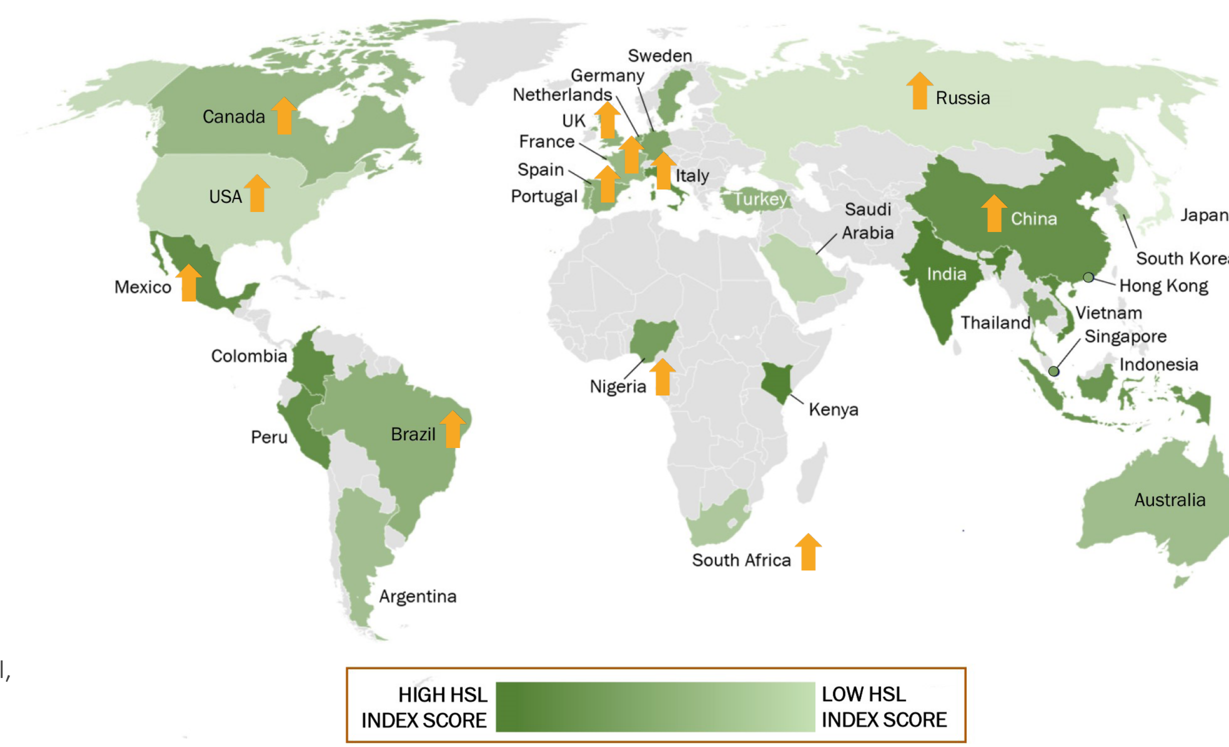
AVERAGE OF 24 MARKETS,* 2019–2021



*For consistent tracking, this chart does not include Colombia, Netherlands, Peru, Portugal, Singapore, Thailand, and Vietnam, as these markets were not surveyed in 2019.

STRENGTH OF SCORE OF SELF-REPORTED BEHAVIORAL INDEX OF HEALTHY AND SUSTAINABLE LIVING

BY MARKET, ARROWS REPRESENT MARKETS THAT HAVE MADE PROGRESS ON THE INDEX SINCE 2019, 2021



INSIGHT 4: BRANDS CAN INSPIRE

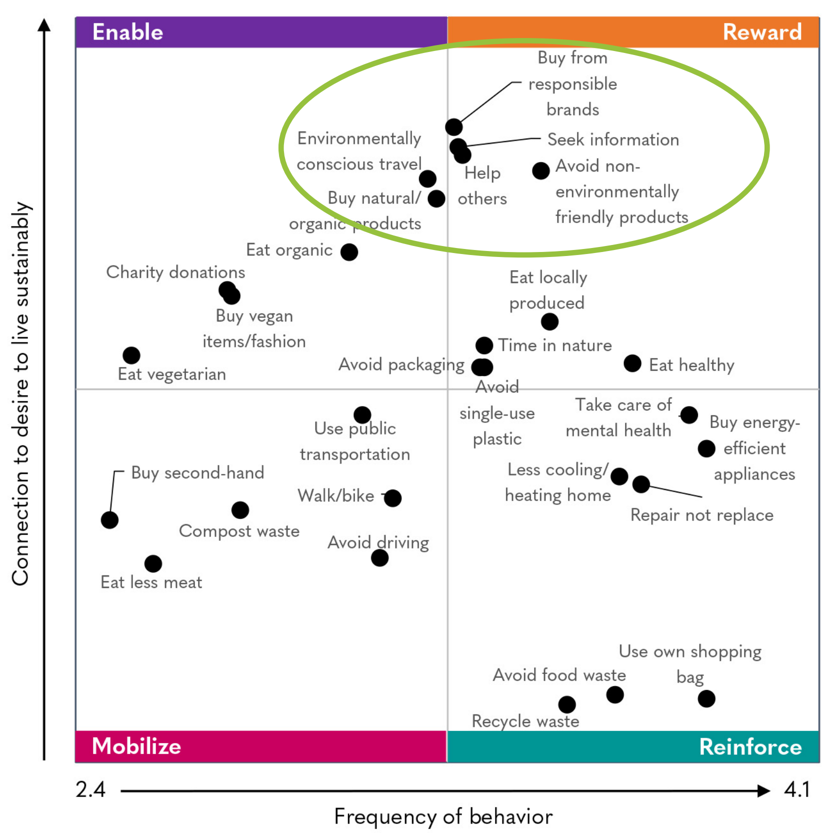
Consumers feel inspired to live sustainably by connecting with responsible brands.

Statistical analysis shows that buying from responsible brands and companies while also avoiding products that are harmful to the environment are actions that are most strongly associated with sustainable living. Consumers are defining their sustainable lives by how they are engaging with brands much more so than through more traditional efforts such as recycling or avoiding food waste.

Many consumers also say that they would be willing to pay more for responsible and sustainable products, further emphasizing their enthusiasm. Brands potentially have the power to engage consumers more broadly, inspiring a more wholistic approach to healthy and sustainable living that extends beyond the marketplace.

BEHAVIORS DRIVING A DESIRE FOR SUSTAINABLE LIFESTYLES

INDIVIDUAL ACTIONS, AVERAGE OF 31 MARKETS, 2021



However, most consumers still have not been engaged by brands around healthy and sustainable living: fewer than half of consumers around the world have heard, read, or seen something about brands helping consumers to live healthier or more sustainably. This suggests an opportunity to increase communications, marketing, and engagement in this area of deepening importance to consumers. Of those who have been engaged, most have been reached through social media, followed by advertising.

> **Brand choice is a critical component of what it means to live a sustainable lifestyle.**

INFORMATION ABOUT HEALTHY AND SUSTAINABLE LIVING

AVERAGE OF 31 MARKETS, 2021

41% say they have heard, read, or seen information in the past 12 months about how brands are helping them to live in a way that is healthy and good for the environment

Where consumers have most heard or seen information in the past 12 months:

INSIGHT 5: TOWARD A SUSTAINABLE FUTURE

Looking ahead, generational trends and consumers' post-pandemic plans suggest we are moving toward a more sustainable future.

The findings suggest that we are orienting toward a healthier and more sustainable society, as young people appear to be more eager to change their behaviors and many people of all generations look forward to changing their habits when imagining a post-pandemic future.

Consumers under 30 are more open to making major changes to become more sustainable, yet their behavior often does not reflect their heightened aspirations. This gap between desires and actual behavior is larger for younger consumers than for those over 30, even though younger consumers are somewhat more likely to report having made major changes in the past year. This aspiration-action gap presents an enormous opportunity for brands to connect and engage with a younger generation who are excited about sustainable living but need more support.

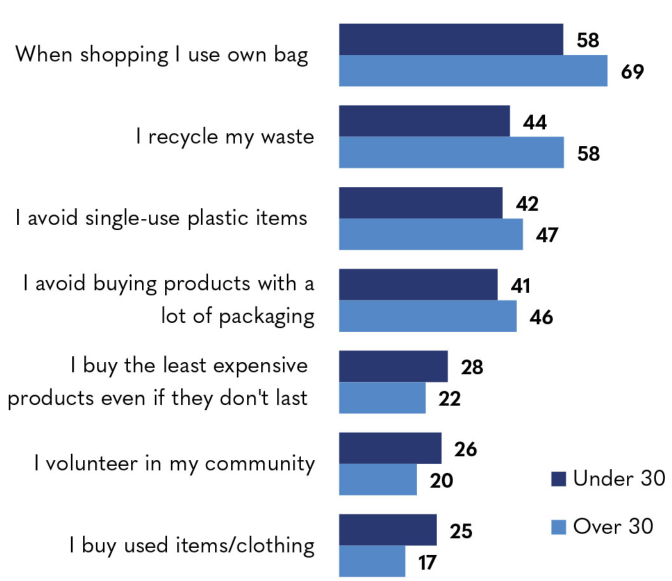
People over 30 may express less intense desires to become more environmentally friendly but they are more likely to engage in regular sustainable behaviors such as bringing their own bag shopping, avoiding single-use plastics, or recycling. However, young people are more likely than those who are older to buy used items, an essential part of more circular and sustainable consumption. They are also more likely to volunteer their time in the community. Interest in these areas might suggest potential openings to connect with younger generations.

Finally, when asked about their family's life once the pandemic is over, many people of all generations hope to live in a way that is more healthy and sustainable. Many expect to pay more attention to their health and enjoy a more home-focused lifestyle, as well as acting more sustainably overall and reducing consumption. Many also plan to buy more from responsible companies, suggesting sustainable brands will play an important part in our imagined post-pandemic future.

Many consumers plan to live more healthily and sustainably when imagining a post-pandemic future.

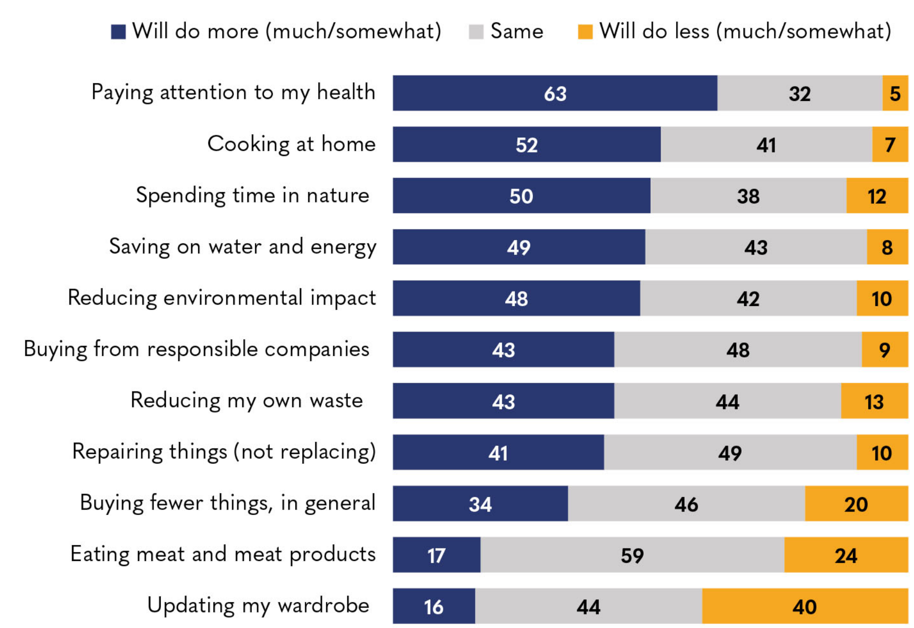
FREQUENCY OF ACTIONS

"MOST OF THE TIME" / "ALL OF THE TIME," SELECTED ACTIONS, UNDER 30 VS OVER 30, AVERAGE OF 31 MARKETS, 2021



DAILY LIFE AFTER THE PANDEMIC

AVERAGE OF 31 MARKETS, 2021



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Know your world.
Lead the future.

GlobeScan is a global insights and advisory consultancy working at the intersection of brand purpose, sustainability, and trust.

We partner with leading companies, NGOs, and governmental organizations to deliver insights that guide decision-making and build strategies that contribute to a sustainable and equitable future.

We combine over 30 years of data-driven insights with a global network of experts and the ability to engage any stakeholder or consumer. Our unique research programs and global capabilities help to know what's new, what's next, and what's needed. And our advisory services help turn that knowledge into smart, strategic decisions

Established in 1987, we have offices in Cape Town, Hong Kong, London, Mumbai, Paris, San Francisco, São Paulo, and Toronto. As a proudly independent, employee-owned company, we're invested in the long-term success of our clients and society. GlobeScan is a Certified B Corp and a participant of the UN Global Compact.

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