Healthy & Sustainable Living

2022 Highlights Report

GlobeScan

In partnership with:

akatu

IKEA

LEVI STRAUSS & CO.

M&C SAATCHI

NYU STERN

PEPSICO

P&G

reckitt

target

VISA

WWF

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 2022 study includes almost 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, IKEA, Levi Strauss & Co., M&C Saatchi Group, NYU Stern Center for Sustainable Business, P&G, PepsiCo, Reckitt, Target, Visa, and WWF International.

Participating Countries

2022

- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 850 in Egypt) (*n*=29,293)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June and July 2022
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.

Key Insights

INSIGHT **1**

The cost-of-living crisis is affecting consumers' ability to access healthy and sustainable living. Soaring inflation across much of the world is making it more difficult for people to afford to live healthier and more sustainable lifestyles, with consumers across several markets reporting less willingness to pay more for responsible products and brands while most perceive of environmentally friendly products as more expensive and potentially out of reach. Now more than ever, brands need to make sustainable options more accesible.

INSIGHT **2**

Our children are driving a sense of urgency about the climate. Global concern about climate change is at an all-time high and a majority of people living with children under the age of 18 say their children are very worried about environmental problems and climate change. People living with children who are worried are more likely than the average to have a strong desire to live sustainably and are much more likely to have made major changes to do so, suggesting the youngest generations are having direct and indirect impacts on consumer behavior.

INSIGHT **3**

People want to do their part, but progress is slow. Although there have been slow but steady increases in frequency of a range of sustainable behaviors compared to before the pandemic, there is a persistent gap between the desire that people have to make major changes to their lifestyles and significant action taken. But the intention is there, with as many as two-thirds claiming to be willing to reduce their consumption by half to prevent environmental damage and climate change, especially among those with worried children at home and among those who say they have been personally affected by climate change – suggesting this willingness to take action will increase over time.

INSIGHT **4**

Consumers are highly receptive to information about sustainable products. Contradicting worries about a consumer backlash, results clearly show that those who have been exposed to information about the environmental benefits of products in a range of categories tend to be mostly trusting of the information – and most also say environmental friendliness plays a role in their purchase decisions. However, the reach of sustainability messages has been limited, with only half of consumers saying they have seen, read, or heard at least "some" information on sustainability for a range of product types – suggesting communications should be ramped up to reach more consumers.

INSIGHT **5**

We need to make sustainable living feel inevitable. Only about half of people believe that it is at least probable that most people will live sustainable lifestyles within the coming decade. However, those who believe that sustainability is probable in the near future are much more likely than others to feel compelled to live more sustainably themselves, and to have taken major steps to change their habits in the past year. Making inevitability – and desirability – of sustainable lifestyles an integral part of the narrative going forward may help accelerate more systemic behavior change.

INSIGHT 1

THE COST-OF-LIVING CRISIS IS AFFECTING CONSUMERS' ABILITY TO ACCESS HEALTHY AND SUSTAINABLE LIVING

While most consumers continue to claim that they would be willing to pay a premium for products that are socially and environmentally responsible, willingness to pay more has declined in many markets hit by rising costs of living.

Amid widespread increases in daily expenses, consumers have become less likely to say they are willing to pay more for products or brands that contribute positively to society or the environment, especially in Europe. Fifty-five percent of people across 23 markets tracked between 2019 and 2022 now say they at least "somewhat agree" they would be willing to pay more for products or brands that work to improve society and the environment, down from 58 percent in 2021 and 2020. Willingness to pay more has declined the most in Australia, Canada, Germany, Indonesia, Italy, Nigeria, Peru, Portugal, Spain, Sweden, and the UK.

Seventy-five percent of consumers across the markets surveyed also agree that environmentally friendly products have become more expensive in the past 12 months, no doubt along with other products in the context of soaring inflation. However, people in China and Japan appear to feel less affected and are less likely to agree. Chinese consumers are also slightly more likely to say they would be willing to pay more for sustainable products compared to 2021, suggesting a diversion from the general trend.

I Am Willing to Pay More for Brands That Improve Society/Environment

"Strongly" and "Somewhat Agree," by Market, 2021–2022

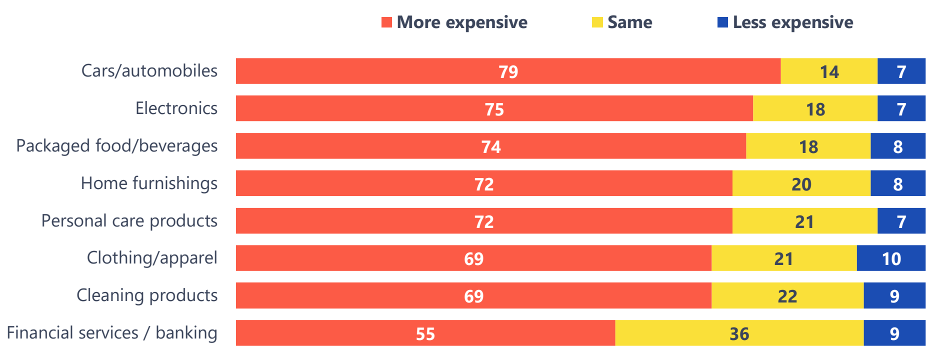
Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements. – I am willing to pay more for products or brands that work to improve society and the environment.

Environmentally responsible alternatives are certainly seen by consumers as premium offerings; products in eight different categories are all seen by substantial majorities as being more expensive than regular products in the same categories. This is less the case for financial services and banking offerings, while environmentally friendly cars are seen as particularly premium in terms of price but also performance.

Majorities in 23 out of 31 markets say they are “greatly affected” by increased costs of living, but people in emerging markets tend to feel the most affected. As consumers are becoming less able – and less willing – to pay a premium for sustainable products, it is becoming increasingly important for brands to focus on affordability and access.

Perceptions of Price of Environmentally Friendly Products vs Regular Products

Average of 31 Markets, 2022



Q9. Thinking of a regular product and a more environmentally friendly version of the same product, how do you think that the environmentally friendly version would compare in terms of price?

Majorities of consumers across almost all markets claim that environmentally friendly products have become more expensive over the past 12 months.

INSIGHT 2

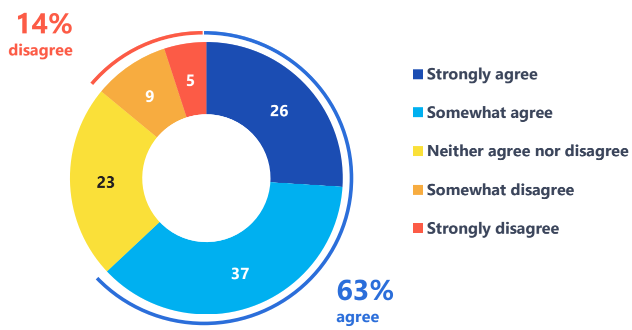
OUR CHILDREN ARE DRIVING A SENSE OF URGENCY ABOUT THE CLIMATE

Most people with children under 18 living in their household say that their children are very concerned about climate change and environmental problems.

Globally, children are expressing their fear about an uncertain future; almost two-thirds of those with children under 18 living in their household say that their children are very worried about environmental problems and climate change. People in Vietnam, Turkey, and India are the most likely to say their children are very worried, while Dutch, Swedish, and Japanese parents are least likely to agree.

My Children Are Worried about Climate Change and Environment

Subsample: Those with Children < 18 Living at Home, Average of 31 Markets, 2022



Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements. – My children are very worried about environmental problems / climate change

Those with worried children at home are much more likely to say they want to change their lifestyles a great deal to be more sustainable and are also much more likely to claim they have made major changes – highlighting the influence that concerned children assert on their families.

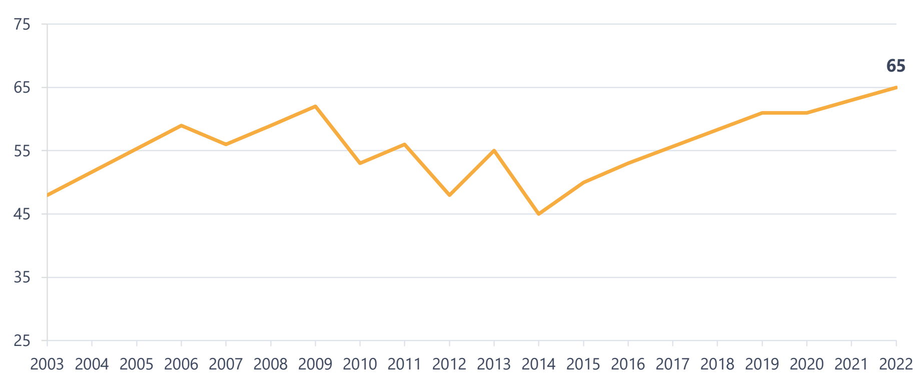
Overall, proportions saying climate change is "very serious" also continue to grow year over year, again having reached unprecedented levels – despite competing worries about inflation and war. Worries about loss of biodiversity and other related issues have also increased, along with concern about extreme poverty.

In addition, people continue to feel increasingly personally affected by climate change, with proportions saying they are "a great deal" personally affected by climate change having increased from 31 percent in 2020 to 37 percent in 2022. People in India, China, and Vietnam report the largest increases over the past year in feeling personally affected by climate change, but most markets see increases over the past three years or consistent high levels of perceived personal impact.

People mostly say they have experienced climate change through extreme heat and food price increases, but many also say they were affected by drought, flooding, fires, and diseases.

Perceived Seriousness of Climate Change

"Very Serious," Average of 17 Markets, 2003–2022*



*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia (not asked in 2022), 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.

T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

INSIGHT 3

PEOPLE WANT TO DO THEIR PART, BUT PROGRESS IS SLOW

Suggesting most people do understand what is at stake, a majority claim they are at least somewhat willing to reduce their consumption by half to avoid environmental damage and climate change.

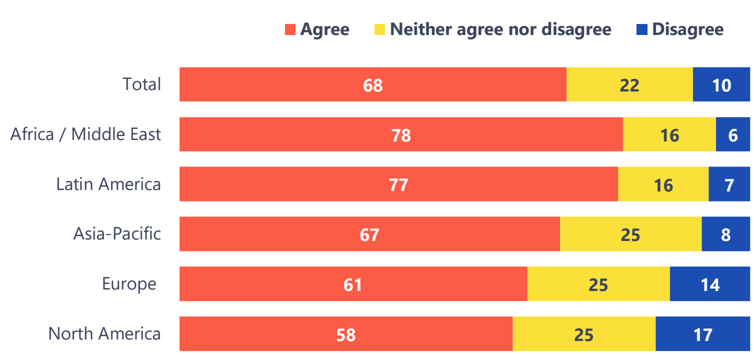
People with worried children at home are particularly likely to be willing to reduce their consumption by half to save the future, again emphasizing the strong influence children have on their families. Those who say they have been personally affected by climate change are also significantly more likely to claim they are ready to cut their own consumption to avoid damage, suggesting people will become increasingly ready to drastically change their lifestyles as they become personally impacted by the effects of climate change.

However, those living in highly industrialized markets are the least likely to claim they would be willing to reduce consumption, despite being the ones most needing to do so. This might change as the effects of climate change start to touch the lives of those previously insulated by their relative wealth.

Overall, people also continue to be much more likely to express a strong desire to live healthier and more sustainable lifestyles than to make major changes to their lives to be healthier and more sustainable. As in previous years of the study, the aspiration-action gap persists across all markets and demographics, with consumers with low purchasing power and those who are younger experiencing the largest gaps between aspiration and action, as do consumers in emerging markets, again highlighting a strong need to make healthy and sustainable living more accessible to all.

Willingness to Reduce Consumption by Half to Avoid Environmental Damage and Climate Change

By Region, 2022

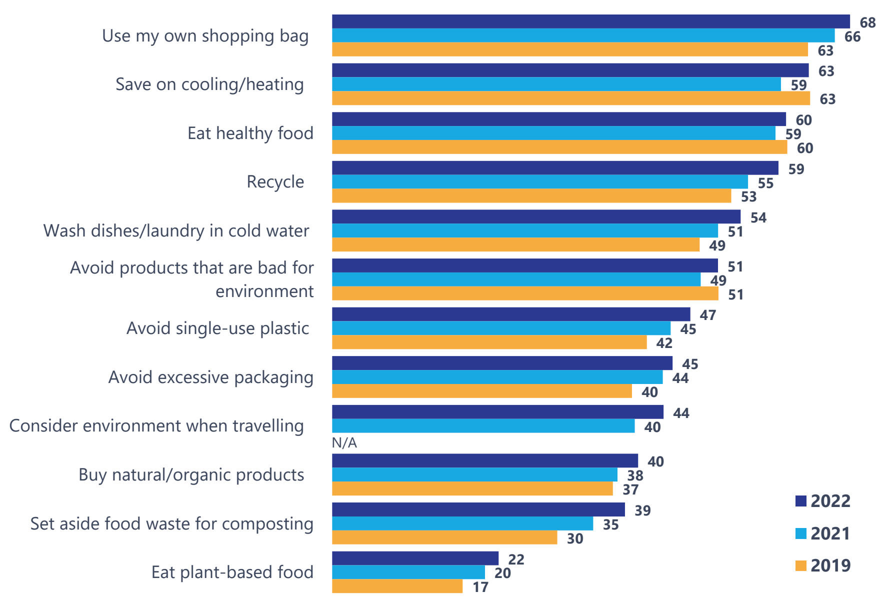


Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements. – I would be willing to reduce consumption by half to avoid environmental damage / climate change

There has been a small but steady increase in frequency of several sustainable behaviors over the past three years. Increases in frequency are seen across a range of sustainable behaviors, with the largest three-year increases having taken place in composting and recycling, followed by avoiding single-use plastic and using their own bag when shopping. Despite remaining less common than other sustainable behaviors, eating only plant-based food has increased significantly across many important markets compared to before the pandemic – including the UK and the USA.

Frequency of Sustainable Behaviors

"Most" and "All of the Time," Average of 23 Markets, 2019–2022*



*For consistent tracking, this chart only includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Italy, Indonesia, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, UK, and USA

Q4. Now we would like you to answer a few questions about what you do in your everyday life. Please indicate how often you do each of the following.

Organizations and brands can help consumers lead the healthier and more sustainable lifestyles that many aspire to but are unable to achieve – especially those with less purchasing power and those who are younger.

INSIGHT 4

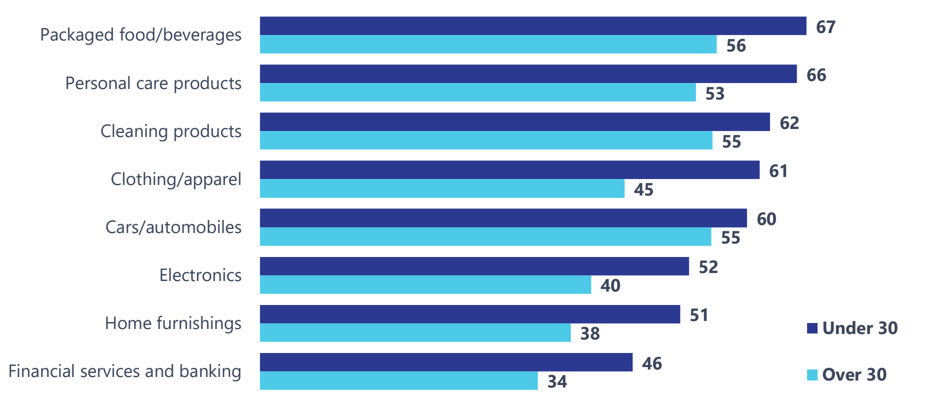
CONSUMERS ARE HIGHLY RECEPTIVE TO INFORMATION ABOUT SUSTAINABLE PRODUCTS

Consumers who are receiving the message are buying in, literally – but reach is limited.

Brands' messaging around sustainability is currently only reaching about half of consumers globally (on average across eight product categories), although younger consumers under 30 are significantly more likely to claim they have been engaged in sustainability marketing – especially by clothing and apparel brands.

Have Seen/Read/Heard Brands Communicate on Being Environmentally Friendly

Average of 31 Markets, Have Seen/Read/Heard "A Great Deal" And "Some," Under 30 vs 30+, 2022



Q47. For each of the following types of products, please indicate how much have you seen, read, or heard brands communicating or marketing information on how environmentally friendly they are.

Most consumers trust communications around products' environmental benefits. However, penetration of sustainability messages and communications remains limited.

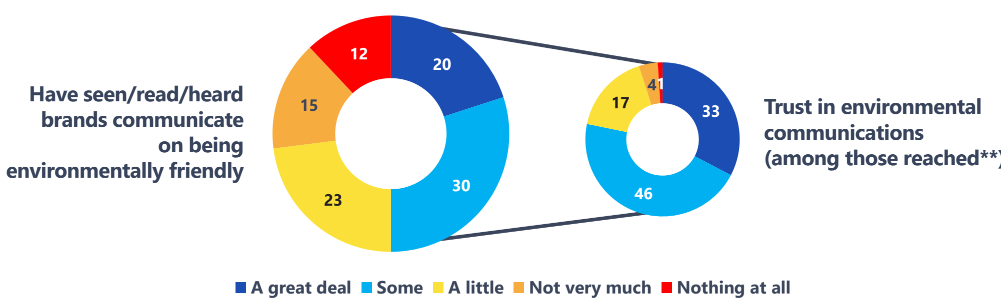
Contradicting recent concerns about consumers becoming turned off by greenwashing, strong majorities of those who have received messages about environmental friendliness say they generally trust communications for product categories where they have seen them. Despite being much more like to have been reached by communications, younger consumers under 30 are not more likely than those over 30 to say that they have at least some trust in the information they have received. Those under 30 are, however, somewhat more likely to express "a great deal" of trust in the messaging.

Most consumers also say that environmental friendliness plays a significant role in how they make purchasing decisions across all tested product categories, especially cleaning products, personal care products, and packaged food and beverages.

The limited reach of information about products' environmental benefits and the positive response that this type of information elicits from consumers highlights the opportunity for more communications from brands to support their sustainable offerings and guide consumers – especially those who are older.

Environmental Communications

Average of 31 Markets, Average of Eight Product Categories, 2022*



*Includes cars/automobiles, cleaning products, clothing apparel, electronics, financial services / banking, home furnishings, packaged food/beverages, and personal care products

**Sub-sample: Those who have heard "a great deal" and "some" of environmental communications for each product category

Q47. For each of the following types of products, please indicate how much have you seen, read, or heard brands communicating or marketing information on how environmentally friendly they are. Q48. For each of these types of products, please indicate how much you trust the information about their environmental friendliness.

INSIGHT 5

WE NEED TO MAKE SUSTAINABLE LIVING FEEL INEVITABLE

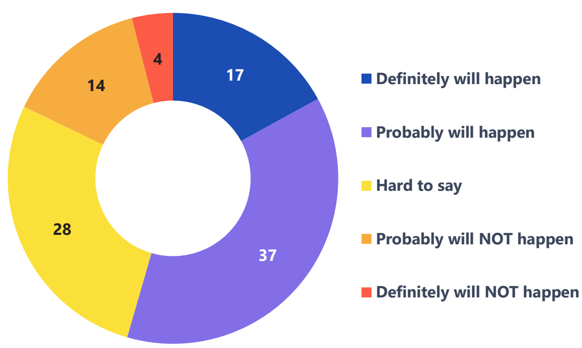
Believing that sustainable living is inevitable helps drive consumer behavior change.

Just over half of people surveyed believe that most of us will be living sustainably in the next decade, while fewer than two in ten say it will not happen. Nevertheless, many remain unsure. Consumers in the Global South are more likely to think that people will live sustainably in the next decade, while North Americans and Europeans remain mostly unconvinced.

People say it is most likely that in the next decade we will be using renewable energy, driving electric cars, and buying locally produced products. Not driving cars at all, producing no waste, or eating plant-based instead of meat are seen as less inevitable. Reflecting the difference in perspective between highly industrialized markets and the Global South, Chinese people are much more likely to see behavior changes as inevitable or probable than are people in the USA.

Most People Will Live Sustainably in the Next Decade

Average of 31 Markets, 2022



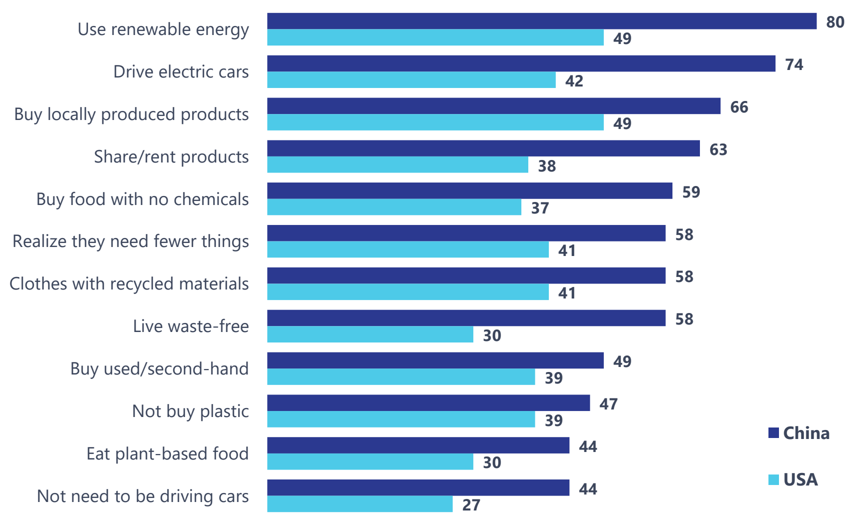
Q40. How likely do you think it is that each of the following will happen in the next ten years?

Those who are convinced that most people will probably be living sustainably in the next decade are much more likely to have a strong desire to live sustainably and to have already made major changes to their lifestyle. These differences are largest in Egypt and the USA, but all markets show a significant impact when it comes to a perception that sustainable living is inevitable.

The research indicates that the more people believe healthy and sustainable living is the way of the future, the more behavior change will be unlocked at scale among consumers.

Attitudes toward a Sustainable Future

"Definitely" and "Probably Will Happen," China vs USA, 2022



Q40. How likely do you think it is that each of the following will happen in the next ten years?

Those who think that most people will be living sustainably in the next decade are much more likely to have a strong desire to live sustainably and to have already made major changes to their lifestyle.

GlobeScan

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 United Nations Global Compact.

www.GlobeScan.com