THE ROAD TO 2025

Five Key Insights to Help Navigate the Shifting Consumer Landscape

HEALTHY & SUSTAINABLE LIVING GLOBAL HIGHLIGHTS 2024

Healthy & Sustainable Living

GlobeScan

Introduction

Empowering consumers to live healthier and more sustainable lives is vital for our shared future and presents a significant opportunity for brands to build trust and engagement.

Our latest *Healthy & Sustainable Living* research shows that people globally feel increasingly impacted by climate and sustainability challenges, however, responses are varied: some are inspired to act while others feel overwhelmed or disengaged. In this shifting landscape, understanding diverse consumer mindsets and tailoring communications is essential to driving meaningful engagement.

This report highlights five key insights to help organizations navigate these challenges, connect with consumers, and foster progress as they prepare for 2025 and beyond.

Launched in 2019, the *Healthy & Sustainable Living* Research Program aims to assist companies in supporting consumers to adopt healthier and more sustainable lifestyles. This program builds on over two decades of GlobeScan's public opinion research in sustainability, branding, and reputation, and is designed to help organizations understand the diverse consumer mindsets that influence their barriers to, and enablers of, healthier and more sustainable living.

This year, the research was developed and backed by a group of dedicated partners including Akatú Institute, BBMG, Consumers International, IKEA, Levi Strauss & Co., Logitech, Mondelez International, NYU Stern Center for Sustainable Business, P&G, PepsiCo, SC Johnson, Target, Visa, and WWF International.

Methodology

The 2024 study is based on over 30,000 interviews conducted across 31 markets, capturing evolving trends and exploring emerging themes. Representative online samples were surveyed in each market, with approximately 1,000 respondents per market (500 in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in Brazil and the USA) totaling 30,216 participants. Samples are representative of the online population in each market and weighted to align with general population census data. The online surveys were conducted in July and August 2024.

– 30,000+ interviews
– 31 markets
– 1,000 respondents per market
– July – August 2024

Participating Markets

2024

FIVE KEY INSIGHTS

1.

The impacts of greenhushing are beginning to materialize. Interest, engagement, and behaviors related to sustainable living are declining in some parts of the world as brands pull back on sustainability communications due to anti-greenwashing regulations while the cost-of-living crisis continues.

2.

An opportunity for brands, governments, and NGOs to support people as they increasingly feel the impacts of climate change. Climate impacts and their implications are changing the way we live our daily lives, presenting opportunities to respond to emerging expectations around adaptation.

3.

People with young families are driving the sustainable living agenda while younger consumers are disengaging. People with children at home are the most receptive to sustainability communications and are most likely to drive the sustainability agenda, whereas young people are increasingly becoming disconnected.

4.

Two distinct expressions of sustainable living. Segmentation shows that there are two well-defined demonstrations of sustainable living – the Enthusiasts and the Minimalists – that require different types of engagement for optimal impact.

5.

There is joy in healthy and sustainable living. Despite the current decline in sustainable consumer behaviors, people remain largely receptive to healthy and sustainable offerings as most associate these with highly desirable and positive lifestyles.

#1

THE IMPACTS OF GREENHUSHING ARE BEGINNING TO MATERIALIZE

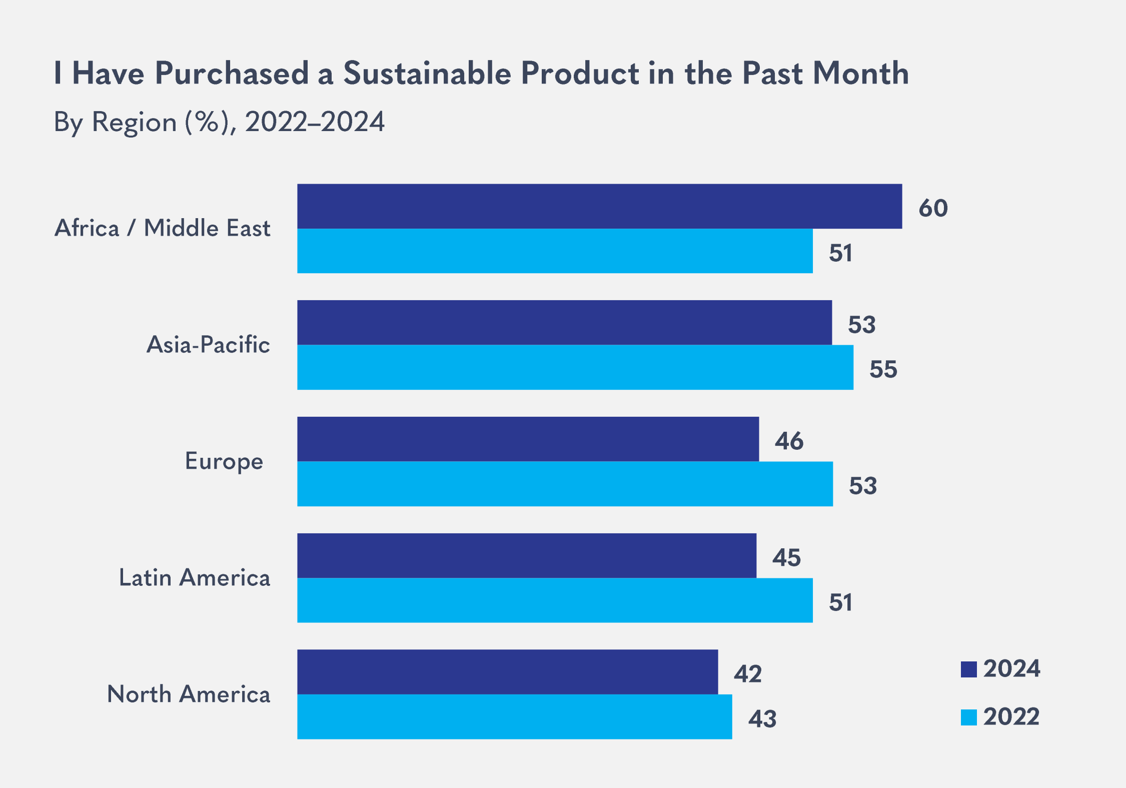
Interest, engagement, and behaviors related to sustainable living are declining in some parts of the world as brands pull back on sustainability communications due to anti-greenwashing regulations while the cost-of-living crisis continues.

Self-reported Purchases of Sustainable Products in Decline

Higher prices and "greenhushing" seem to be affecting consumers' uptake of and enthusiasm for sustainable living in some regions and markets.

Self-reported purchases of environmentally friendly products are down in all regions except for Africa as inflation and anti-greenwashing regulations have often caused the marketing of sustainable offerings to take a back seat.

Another case in point, labels and certifications have become a less common way for consumers to identify sustainable products as brands have often been forced to limit these in the face of stricter regulations.

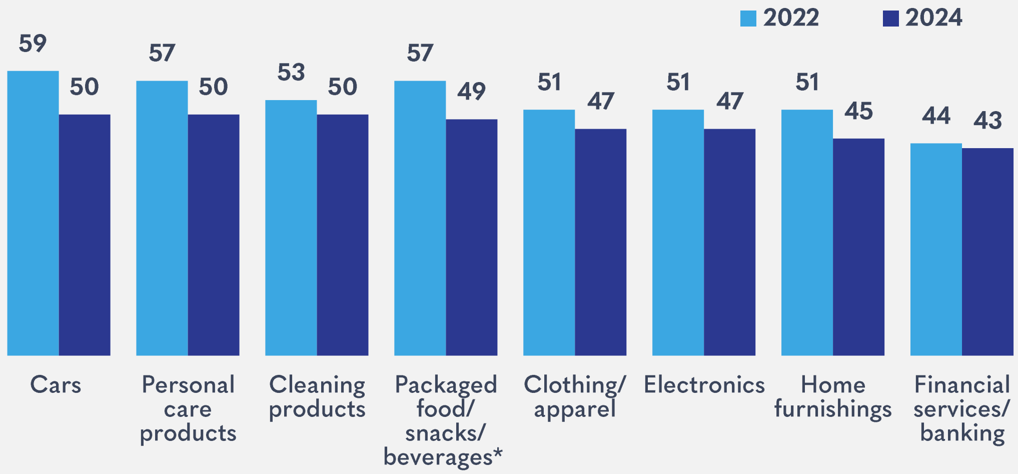


A Waning of the Perceived Appeal of Sustainable Products

In addition, there has been a decline in perceptions about the quality of sustainable products vs traditional products across all categories and regions, suggesting a decline in the appeal of sustainable alternatives.

Perceptions of Sustainable Products Being Better

Average of 31 Markets (%), 2022–2024



*In 2022 this item was asked as Packaged food and beverages

Keep Consumers Engaged

The vast majority of consumers in all markets express enthusiasm and interest in healthy and sustainable living and see this lifestyle as being very desirable. However, there is a danger that brands may fail to recognize this sizeable opportunity. Effective and credible sustainability communications are needed to keep consumers engaged and to capitalize on their desire for sustainable living.

#2

AN OPPORTUNITY FOR BRANDS, GOVERNMENTS, AND NGOS TO SUPPORT PEOPLE AS THEY INCREASINGLY FEEL THE IMPACTS OF CLIMATE CHANGE

Climate impacts and their implications are changing the way we live our daily lives, presenting opportunities to respond to emerging expectations around adaptation.

The Number of People Affected by Climate Change Continues to Grow

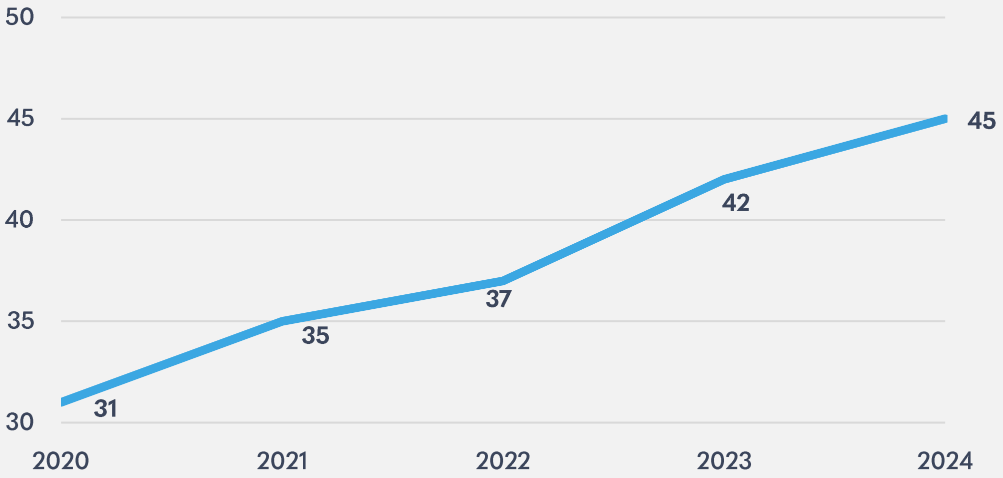
The proportion of people who say they feel personally impacted by climate change has been increasing since this metric was first tracked in 2020.

In 2024, 45 percent of respondents in the 26 markets tracked now say they are greatly affected by climate change, an increase of 14 percentage points since 2020.

We are approaching a critical juncture in the public perception of the climate crisis, with nearly half of the global population feeling directly impacted by climate change (although there is significant variation across markets).

Feeling Greatly Affected by Climate Change

Average of 26 Markets (%),* 2020–2024



*For consistent tracking, this chart does not include Colombia, Egypt, Netherlands, Peru, and Portugal as these markets were not surveyed in 2020.

Impacts of Climate Change on Daily Life

As more people personally experience the direct impacts of the climate crisis, they are changing the way they live their daily lives – with profound implications for brands.

Many connect climate impacts with increasing food prices and are taking action by trying to avoid food waste while others are forced to use less water in the face of water shortages.

Those affected by heat may choose to spend more time indoors while also changing the way they dress or travel.

Impacts of Climate Change on Daily Life

Those Affected by Climate Change, Average of 31 Markets (%), 2024

An Opportunity for New Products and Services

Understanding how consumers are shifting their daily behaviors because of climate change will have strategic implications for brands and will provide new opportunities for the design and innovation of adaptation-focused products and services.

#3

PEOPLE WITH YOUNG FAMILIES ARE DRIVING THE SUSTAINABLE LIVING AGENDA WHILE YOUNGER CONSUMERS ARE DISENGAGING

People with children at home are the most receptive to sustainability communications and are most likely to drive the sustainability agenda while young people are becoming increasingly disconnected.

Families with Children Are Leading the Way on Sustainable Living

Those with children at home tend to be the most worried about sustainability, the most prone to act, and the most confident that a sustainable future is inevitable.

People with children are also much more likely to say they engage in sustainable purchasing behaviors.

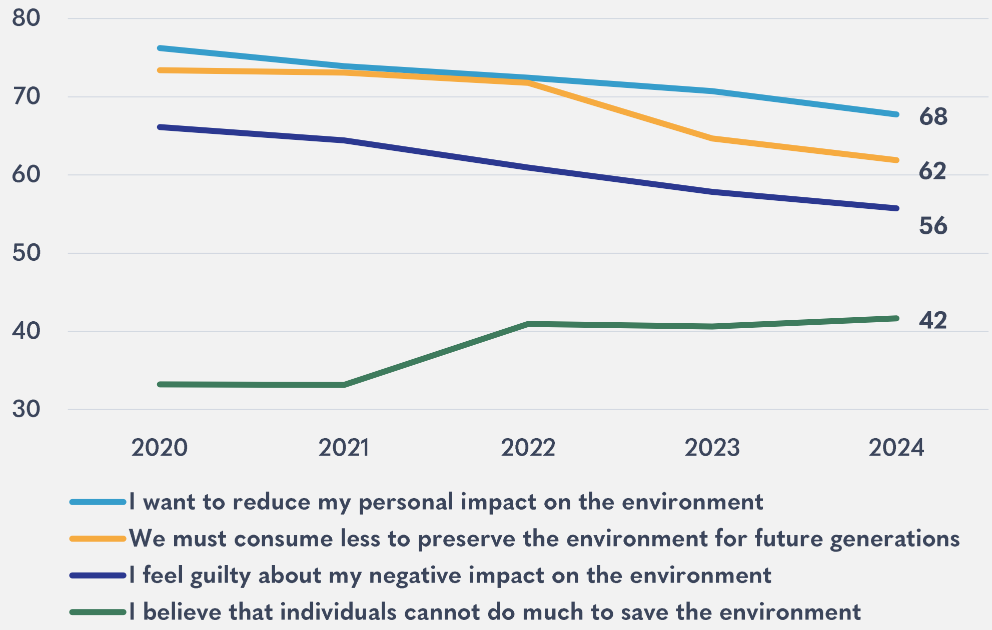
Young People Are Disengaging

Despite the common assumption that Gen Z consumers are the most engaged on sustainability, our research shows that this is not the case.

While young people tend to feel the most impacted and concerned about climate change and other environmental issues as well as feeling high levels of eco-anxiety, they are becoming increasingly disengaged and disempowered when it comes to sustainable living.

Environmental Attitudes

"Strongly" and "Somewhat Agree," Ages 18–24, Average of 31 Markets, 2020–2024



Focus on Families with Children

People with children at home are a sustainability sweet spot and represent a critical demographic on which brands can focus their marketing and communications. For younger audiences that are concerned about sustainability but are finding agency difficult to manifest, brands can help empower Gen Z by focusing on innovative aspects of sustainable living and using social media to engage them directly while addressing barriers like affordability and lack of knowledge.

#4

TWO DISTINCT EXPRESSIONS OF SUSTAINABLE LIVING

Segmentation reveals two well-defined demonstrations of sustainable living that require different types of engagement.

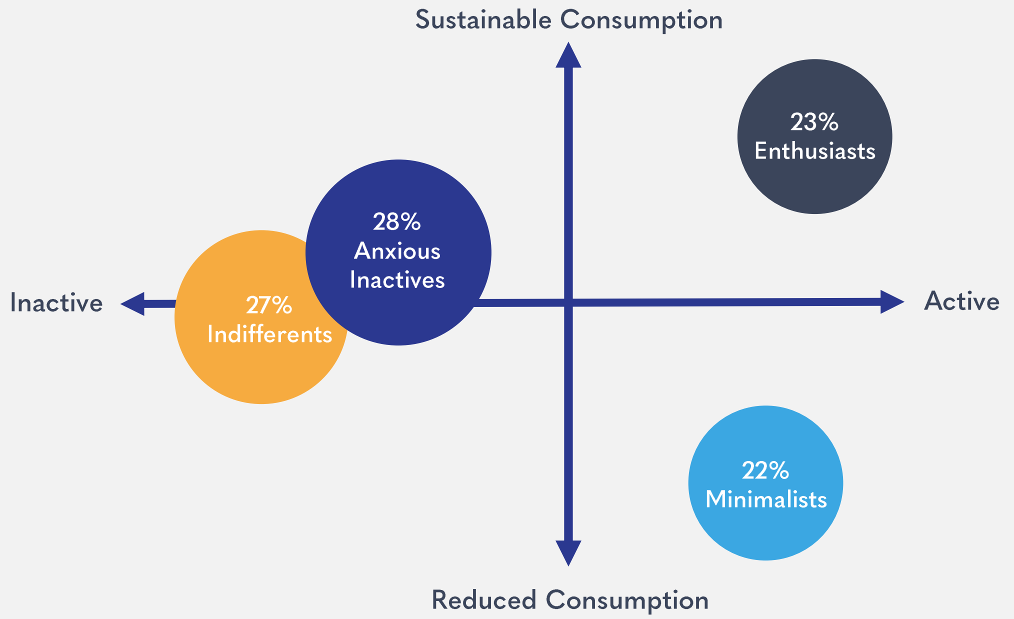
Mapping Consumer Mindsets on Sustainability

Consumer segmentation based on sustainability attitudes shows that there are two main segments of activated consumers: those who try to reduce their footprint and consumption while trying to save money (Minimalists) and those who try to consume better and engage more fully in sustainable living (Enthusiasts).

Consumers who are more disengaged also fall into two groups: those who are anxious and unable to act (Anxious Inactives) and those who are completely disconnected (Indifferents).

Segmentation Based on Environmental Attitudes

Average of 31 Markets, 2024



Breaking Down the Different Mindsets of Sustainable Consumers

28%
Anxious
Inactives

Anxious Inactives are environmentally conscious and feel a significant amount of guilt and anxiety about their negative impact on the environment but believe that individual actions have limited impact and are relatively disengaged. This segment has the highest percentage of Gen Z. Emphasizing easy steps to make progress feel achievable is how to best engage Anxious Inactives, helping them break free from the anxiety-inaction cycle.

27%
Indifferents

Indifferents are the least environmentally conscious segment and engagement is lower compared to other segments. To reach Indifferents, providing general communications to show personal benefits such as saving money without overemphasizing sustainability is the most effective method.

23%
Enthusiasts

Enthusiasts are the most environmentally conscious and empowered segment and are highly engaged in sustainable behaviors and sustainable purchasing. This segment tends to be slightly overrepresented in emerging markets, particularly in Africa. The unlock for Enthusiasts involves the excitement of new sustainable products and services, showcasing how sustainability can offer better and different experiences.

22%
Minimalists

Minimalists, who are slightly overrepresented in Europe and North America, tend to be less active and express their environmentalism in a different way that is more associated with the degrowth movement – focusing on decreased personal consumption and reducing their footprint in ways that are also saving money for those under inflationary pressure. The key to engaging Minimalists is to focus on products, services, and behaviors that help reduce their footprint in an affordable way.

Understand and Connect with Consumers

Segmentation allows brands to move beyond one-size-fits-all messaging by identifying specific consumer groups based on their environmental attitudes. This understanding enables brands to create tailored strategies, address unique needs and barriers, and connect with consumers in ways that inspire action and build trust.

#5

THERE IS JOY IN HEALTHY AND SUSTAINABLE LIVING

Despite the current decline in sustainable consumer behaviors, people remain largely receptive to healthy and sustainable offerings as most associate these with highly desirable and positive lifestyles.

The Meaning of Healthy and Sustainable Living

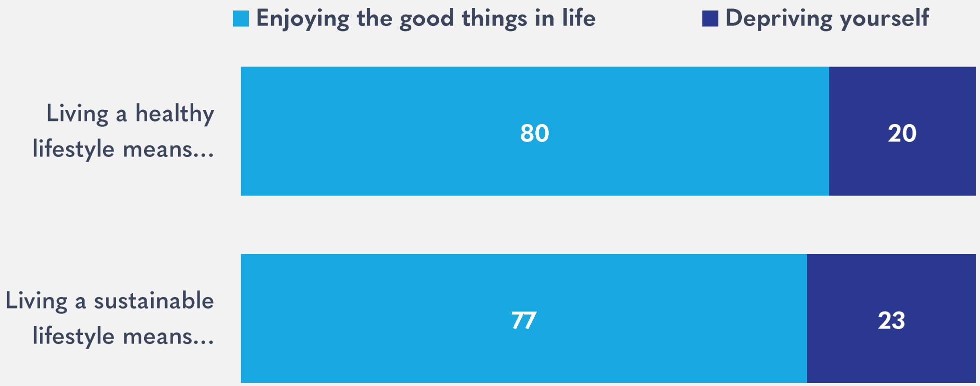
People do not see healthy and sustainable living as having to sacrifice their current lifestyles. Instead, there is excitement about what it brings.

Overwhelming majorities in all markets surveyed see both healthy and sustainable living as desirable and joyful, suggesting a still-untapped opportunity for brands to offer people what they need to live in a way that they feel is better both for themselves and for the planet.

Our previous research shows that people increasingly recognize the link between health and sustainability. Most experience physical, mental, and emotional benefits from living a sustainable lifestyle, and healthy living can significantly help drive sustainable living.

Are Healthy and Sustainable Lifestyles Seen as Enjoyable or Restrictive?

Average of 31 Markets (%), 2024



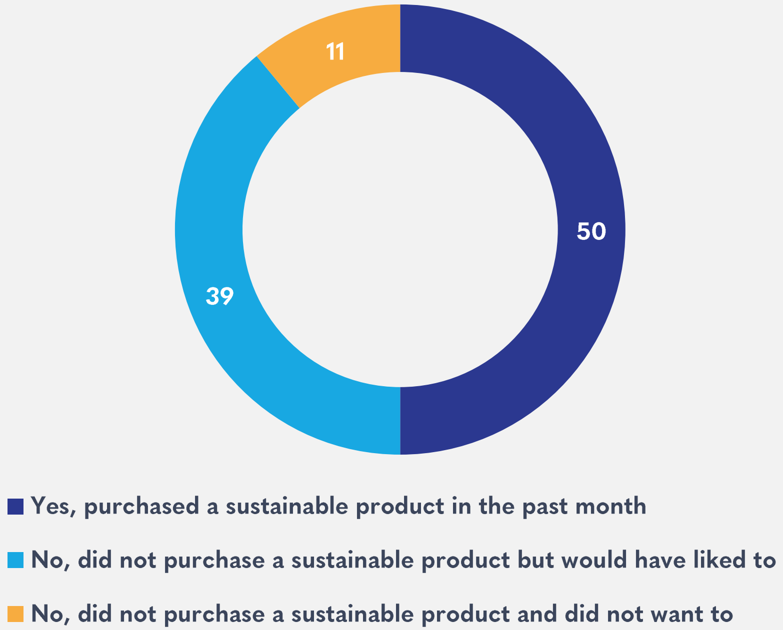
Most Consumers Want to Buy Green

Further emphasizing the ongoing potential around sustainable living, the vast majority of consumers continue to say they have either purchased a sustainable product in the last month or would have liked to.

For those who would have liked to have purchased a sustainable product but were unable to do so, barriers such as high prices, a lack of awareness of sustainable options, or a lack of sustainable options where they shop present opportunities for brands to help provide solutions to further engage and enable consumers.

Recent Sustainable Product Purchase

Average of 31 Markets (%), 2024



Evoke Positive Emotions

Brands can appeal to consumers by evoking the positive emotional aspect of living a healthy and sustainable lifestyle which they see as being part of living a good life. Sustainability and well-being provide an opportunity for innovation and premium quality which can translate into margins and market share.

Know your world.
Lead the future.

GlobeScan is a global insights and advisory firm specializing in trust, sustainability, and engagement. We equip companies, NGOs, and governmental organizations with the insights they need to make sense of their rapidly changing world and respond to shifting societal and stakeholder expectations.

We help our clients craft evidence-led strategies that reduce risks and create value for themselves and society. Our purpose is to co-create a sustainable and equitable future.

Established in 1987, we have offices in Cape Town, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, and Toronto. GlobeScan is a participant of the UN Global Compact and a Certified B Corporation.

Learn more: www.globescan.com

Want to better understand your customers' attitudes and behaviours toward healthy and sustainable living?

Get in touch with our team