

**Healthy &
Sustainable
Living**

2024 MARKET REPORT

Canada



CBSR

**Globe
Scan**

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 Canadians 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 help organizations navigate these challenges, connect with consumers, and foster progress as they prepare for 2025 and beyond.

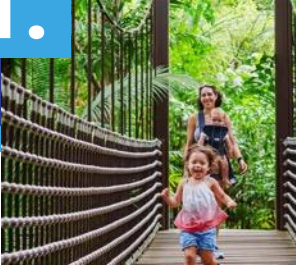
Launched in 2019, the *Healthy & Sustainable Living* Research Program aims to assist companies in supporting consumers to adopt healthier and more sustainable lifestyles. This program builds on over two decades of GlobeScan's public opinion research in sustainability, branding, and reputation, and is 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.



FIVE KEY INSIGHTS

1.



Canadians continue to be concerned about environmental challenges and are increasingly feeling impacts of climate change AND see real value in sustainable living.

Companies and brands can seize this opportunity and drive real change.

2.



Yet Canadians are losing some agency when it comes to sustainable living.

Canadians want to live sustainably but need more solutions to make it possible.

3.



The cost-of-living crisis is affecting consumer views, however, and we need to be mindful of the double-edged sword of sustainability: attractive BUT expensive.

Sustainable living is not yet accessible for all, so lowering barriers is critical.

4.



Expectations for companies to deliver solutions to society and as employers remain high in Canada.

The business case for sustainability needs to be refreshed, focusing on creating value.

5.



However, our greenwashing and perceived lack of commitment from companies is having an impact on overall perceptions.

Building trust is a long-term objective, but building momentum can start today.

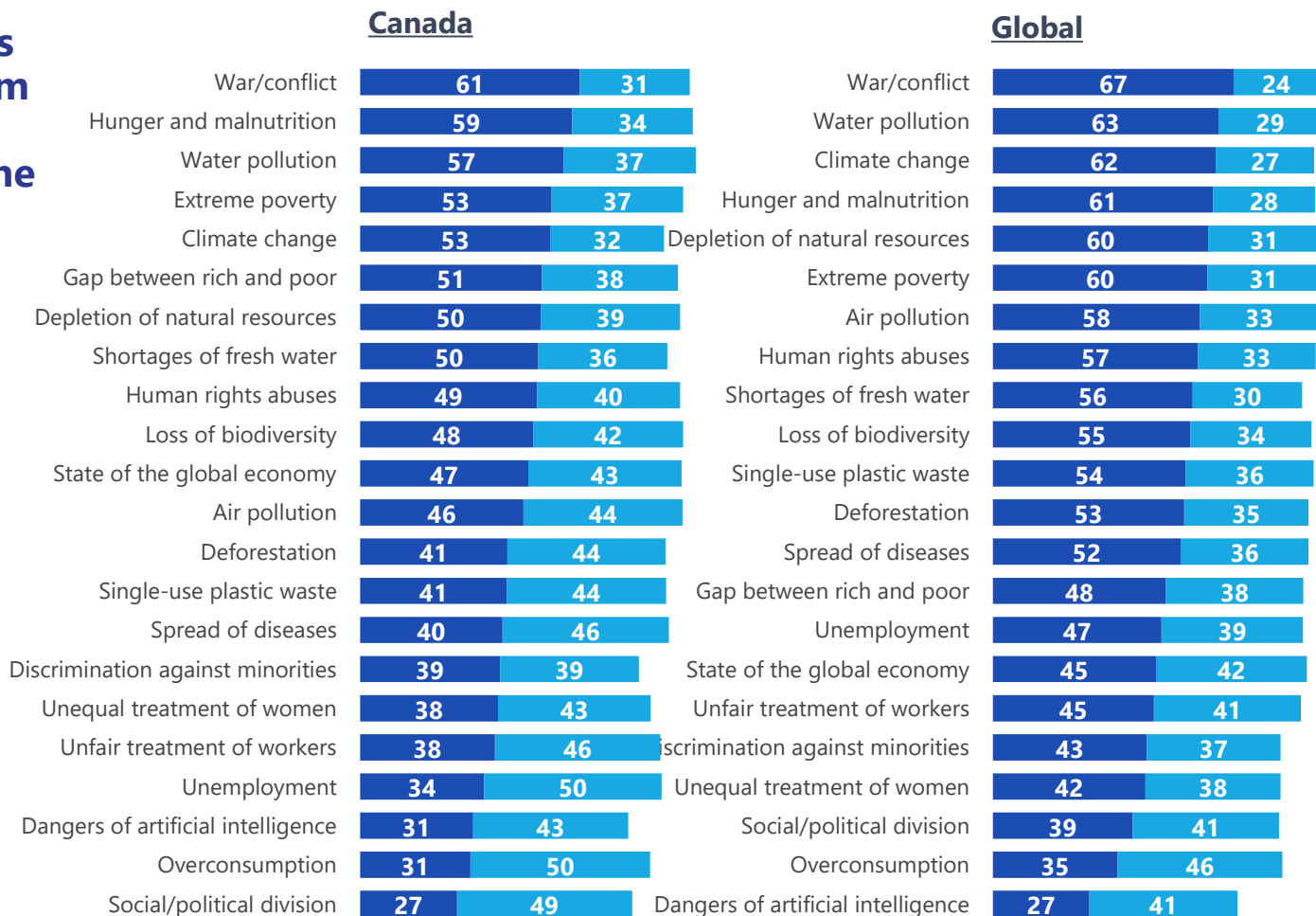
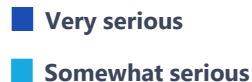
A series of five orange geometric shapes, primarily triangles and trapezoids, of varying sizes and orientations, arranged in a fan-like pattern on the left side of the slide.

Healthy and Sustainable Living in Context

War/conflict is seen as the top global problem among people in Canada, in line with the global average

Perceived Seriousness of Global Problems

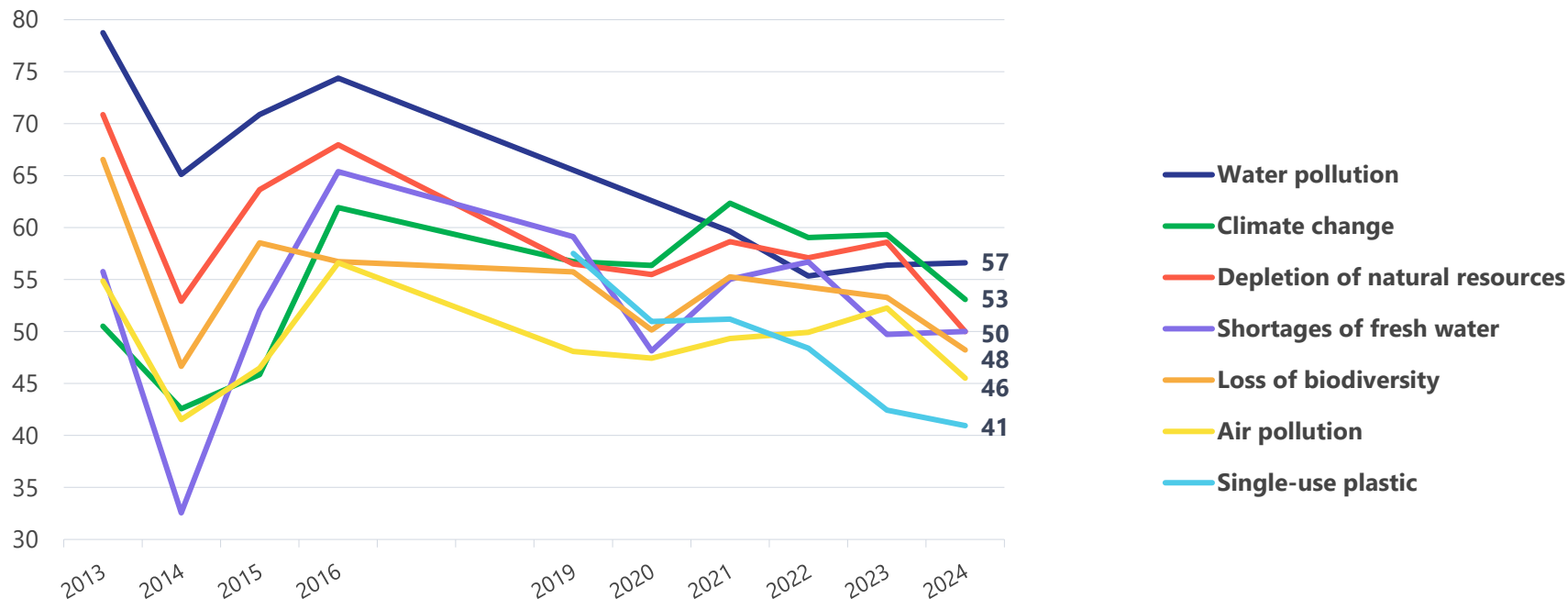
"Very" and "Somewhat Serious," Canada vs Global, 2024



Concern for environmental issues has generally declined in Canada over the past decade

Perceived Seriousness of Environmental Problems

"Very Serious," Canada, 2013–2024*

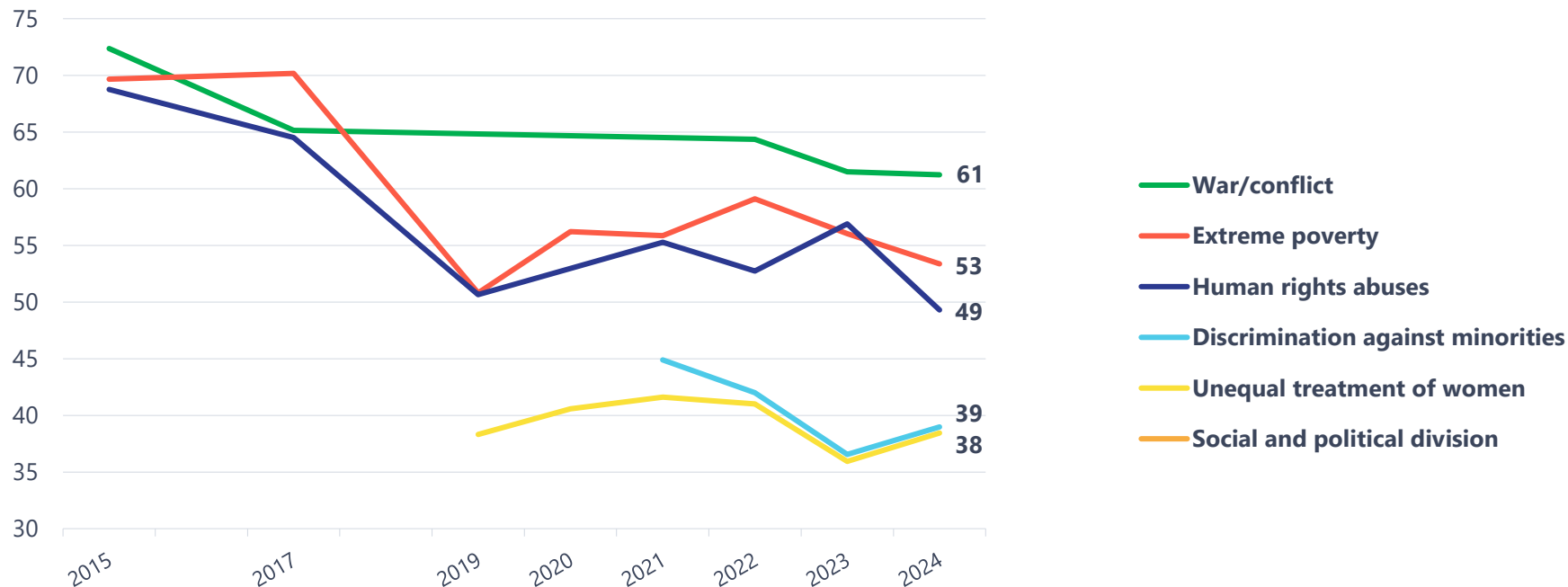


*Before 2019 this question was asked using an in-person and telephone methodology.

Concern for war and conflict has remained relatively steady in Canada, other social issues are perceived as less serious

Perceived Seriousness of Social Problems

"Very Serious," Canada, 2015–2024*

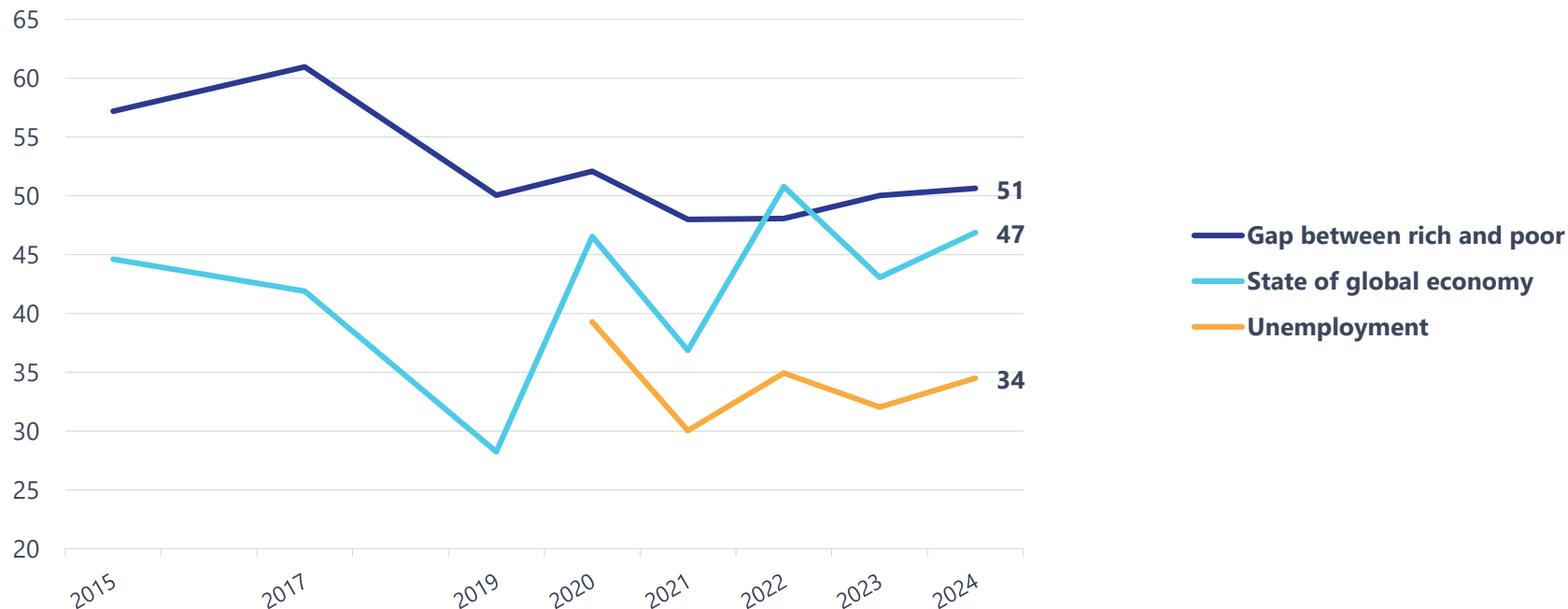


*Before 2019 this question was asked using an in-person and telephone methodology.

Concern for the global economy has been volatile over the past few years in Canada, reflecting inflationary concerns

Perceived Seriousness of Economic Problems

"Very Serious," Canada, 2015–2024*



*Before 2019 this question was asked using an in-person and telephone methodology.

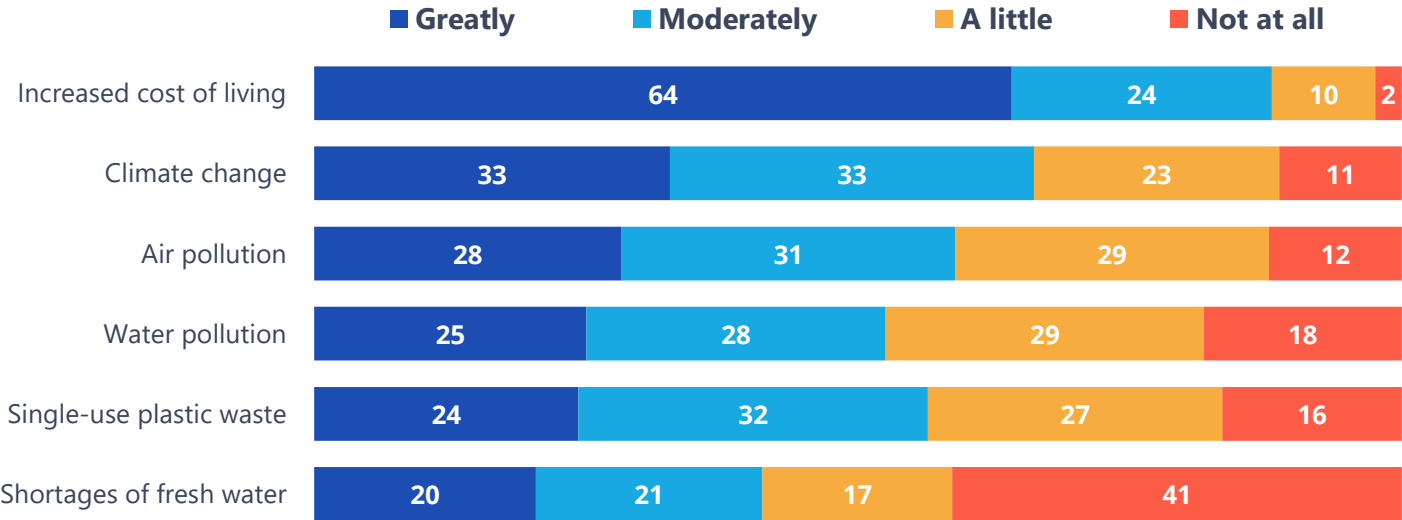
- 8 T1. For each of the following possible *global* problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Inflation is having a greater impact on people in Canada than any other issue, but one third of Canadians feel greatly affected by climate change



Extent Personally Affected by Issues

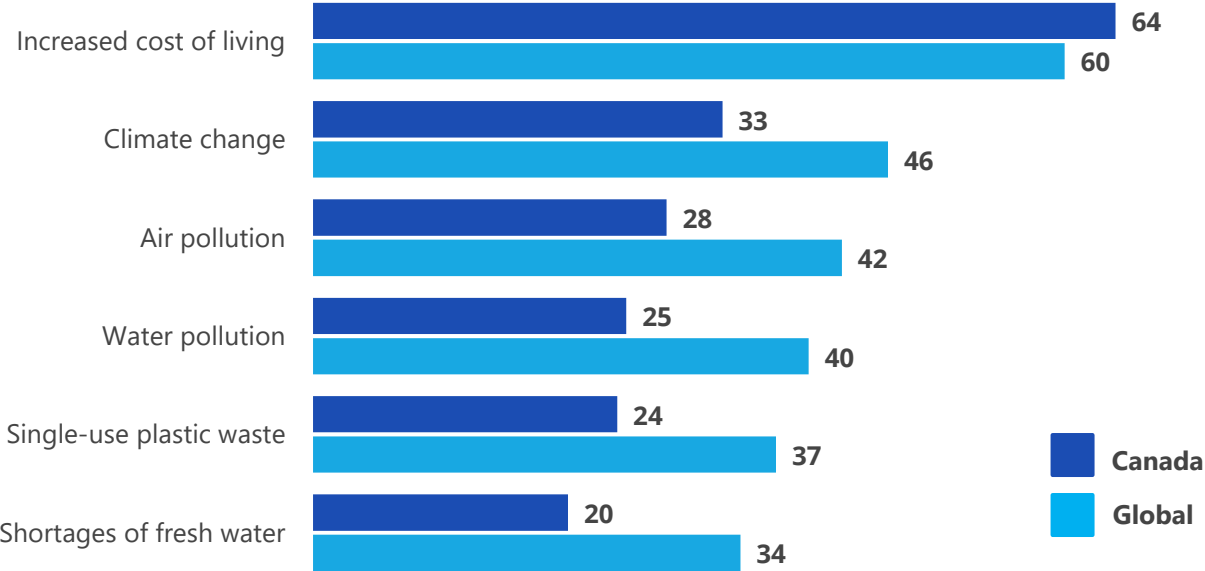
Canada, 2024



More people in Canada say they are impacted by inflation compared to the global average, while fewer tend to feel affected by environmental issues

Extent Personally Affected by Issues

"Greatly Affected," Canada vs Global, 2024

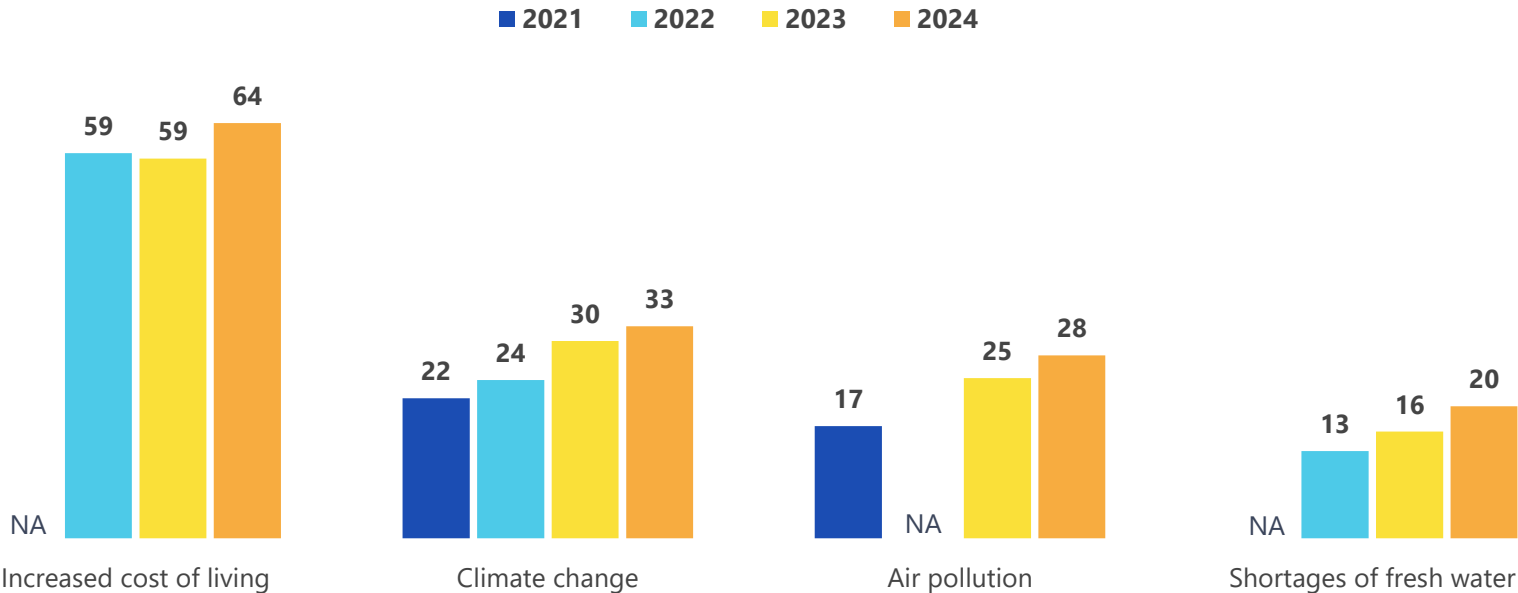


Canadians have become more likely to feel impacted by inflation, climate change, and other environmental issues than in previous years



Extent Personally Affected by Issues

"Greatly Affected," Canada, 2021–2024



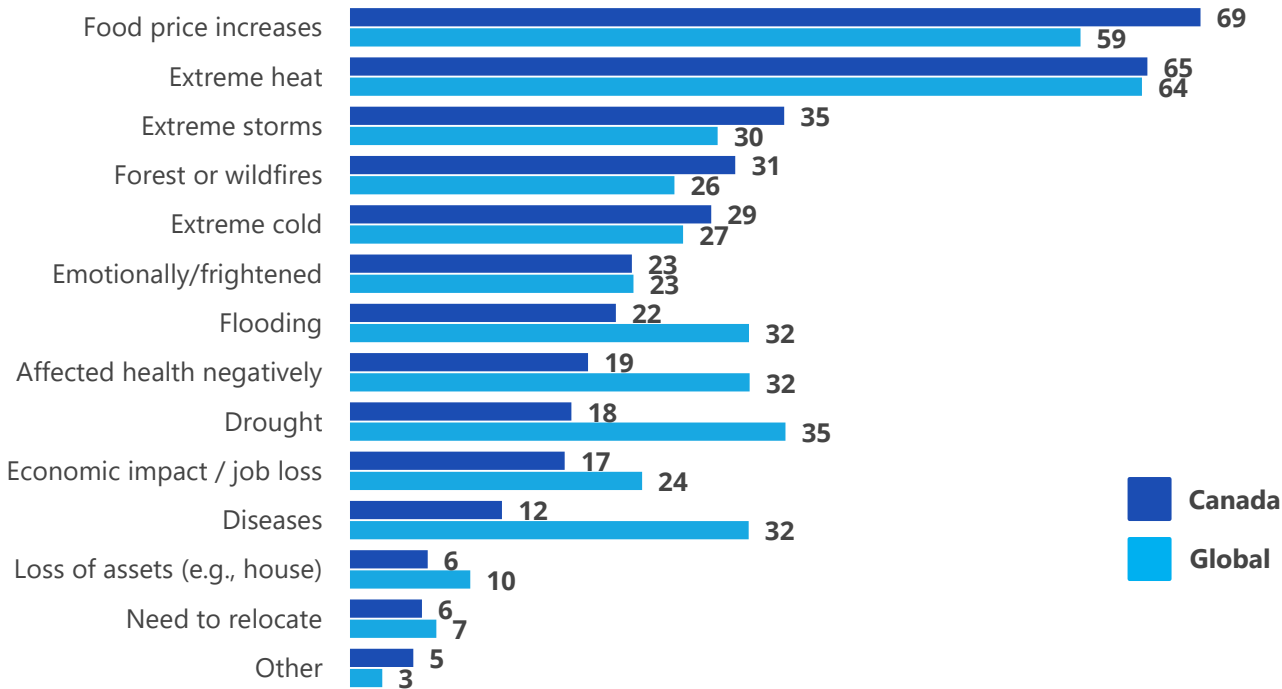
A series of five orange geometric shapes, primarily triangles and trapezoids, of varying sizes and orientations, arranged in a fan-like pattern on the left side of the slide.

Dealing with Climate Change

People in Canada say they feel most impacted by climate change through higher food prices and extreme heat

How People Have Been Affected by Climate Change

Subsample: Those Who Are Greatly/Moderately Affected by Climate Change, Canada vs Global, 2024

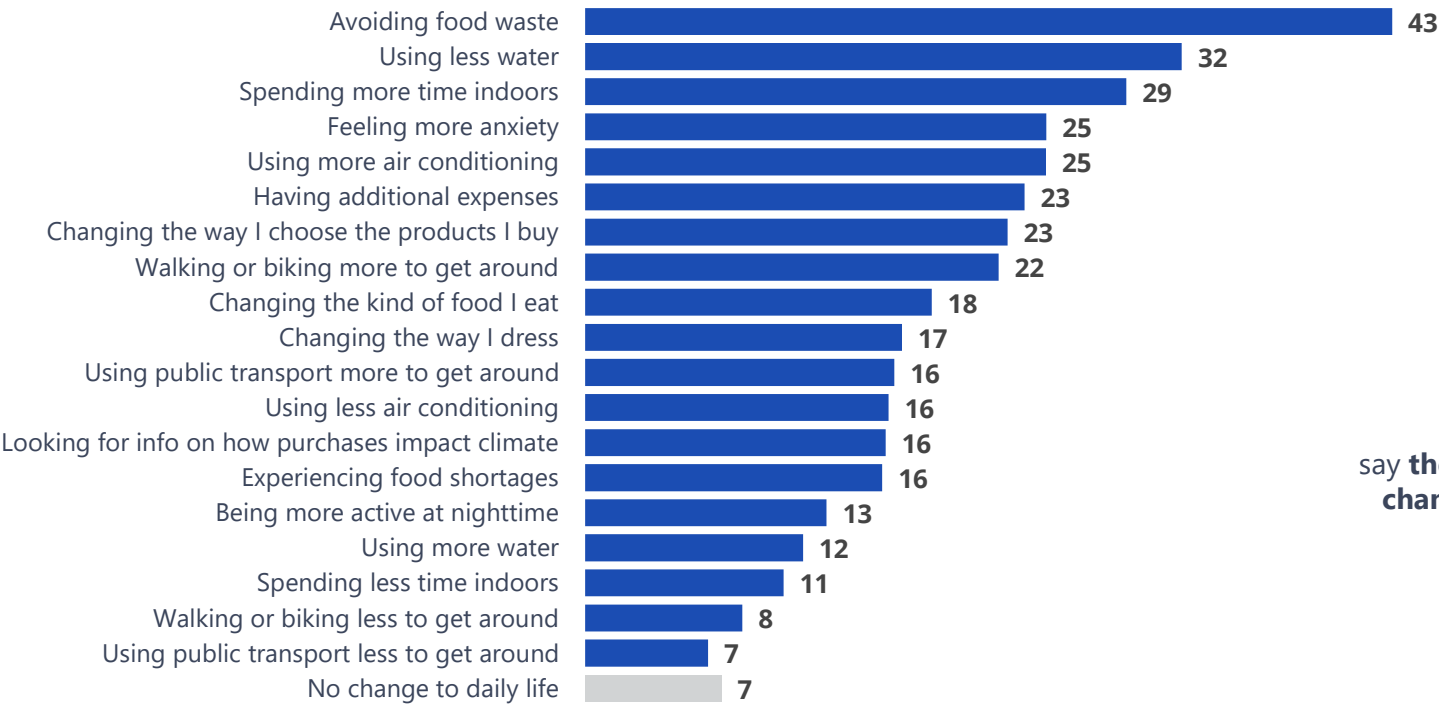


Canadians are most likely to say that they now avoid food waste because of extreme weather due to climate change, and use less water



Impact of Climate Change on Daily Life

Subsample: Those Who Are Greatly/Moderately Affected by Climate Change, Canada, 2024



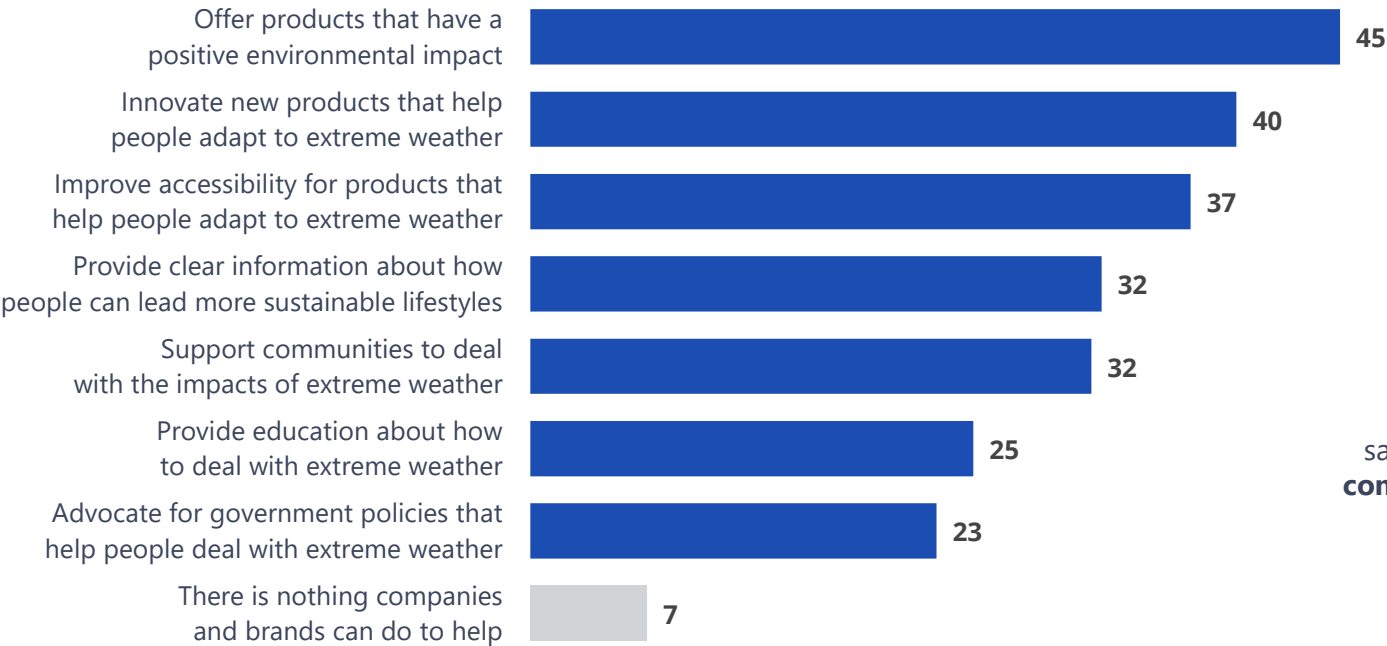
7%
say **there has been no change** to daily life

People in Canada believe that brands can help them deal with extreme weather by offering sustainable and innovative products



How Brands Can Help People Deal with Climate Impacts

Total Mentions, Canada, 2024



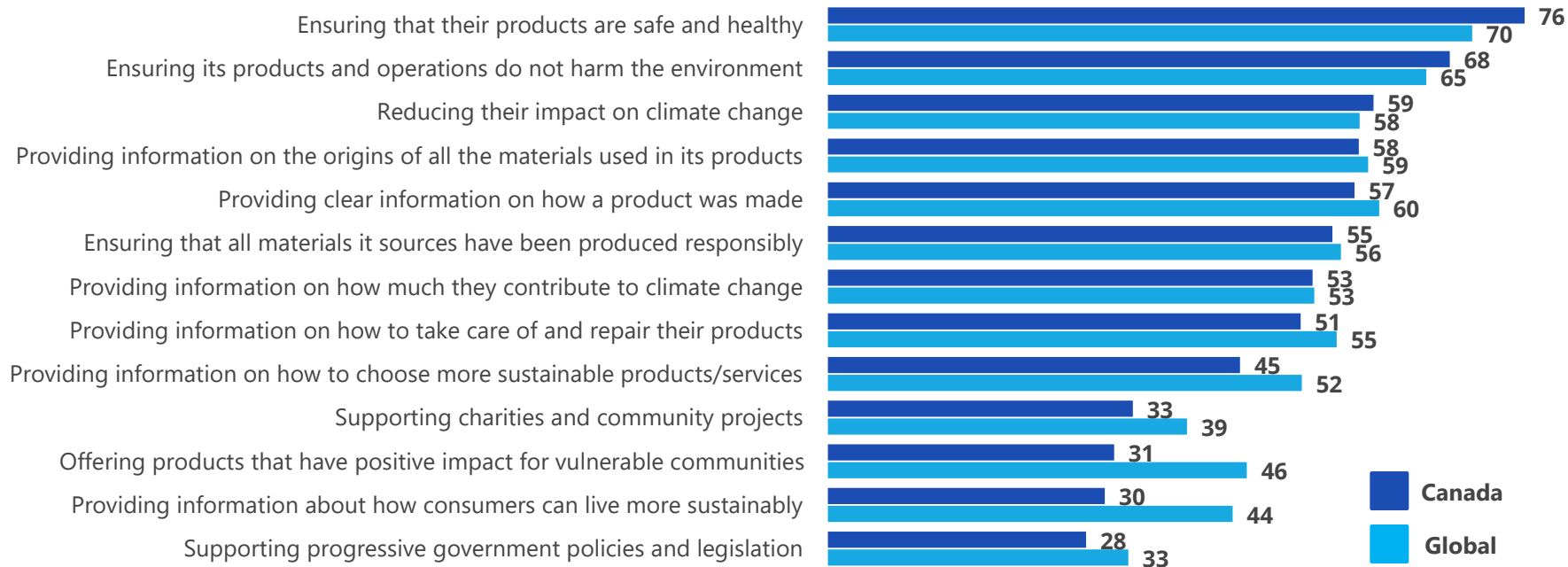
7%
say **there is nothing**
companies and brands
can do to help

Expectations of Brands and Companies

Compared to the global average, Canadian consumers tend to have similar expectations of large companies regarding core functions and transparency

Expectations of Large Companies

Net Expectations,* Canada vs Global, 2024



*(4+5) minus (1+2) on a scale of 1 to 5, where 1 is "Not held responsible" and 5 is "Held completely responsible"

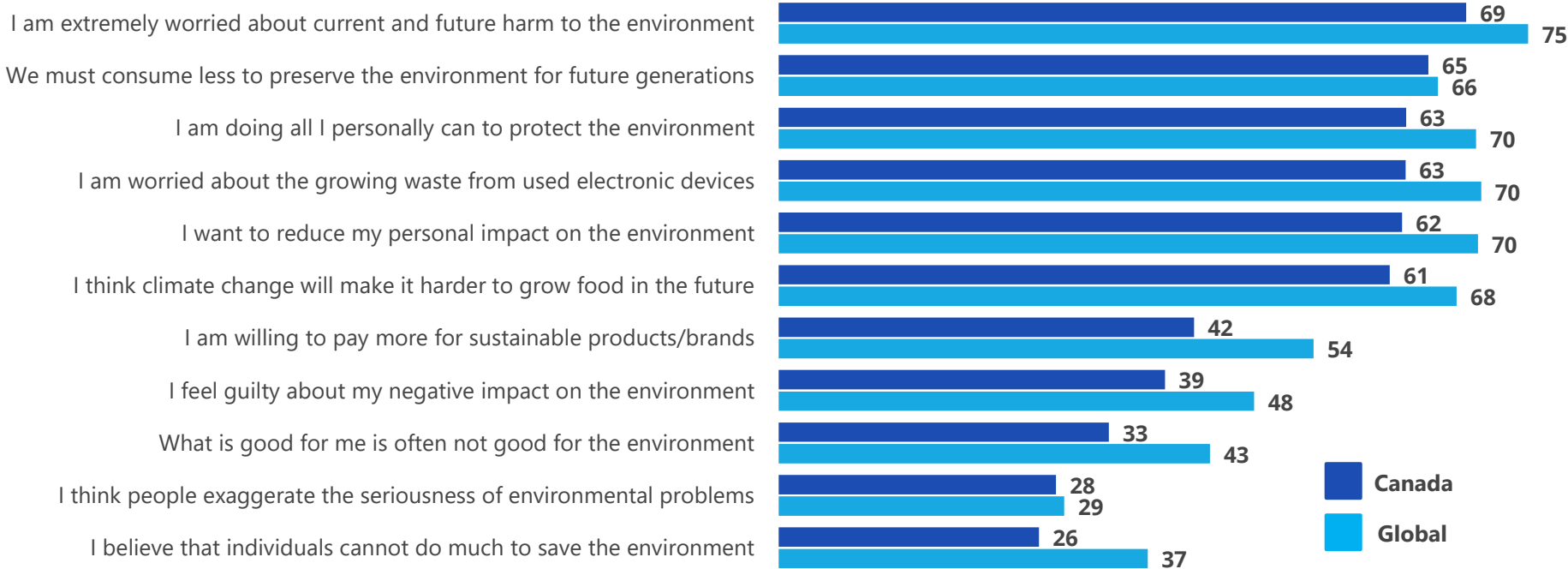
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Attitudes

People in Canada tend to be slightly less environmentally conscious than the global average, but feel more empowered to make a difference

Environmental Consciousness

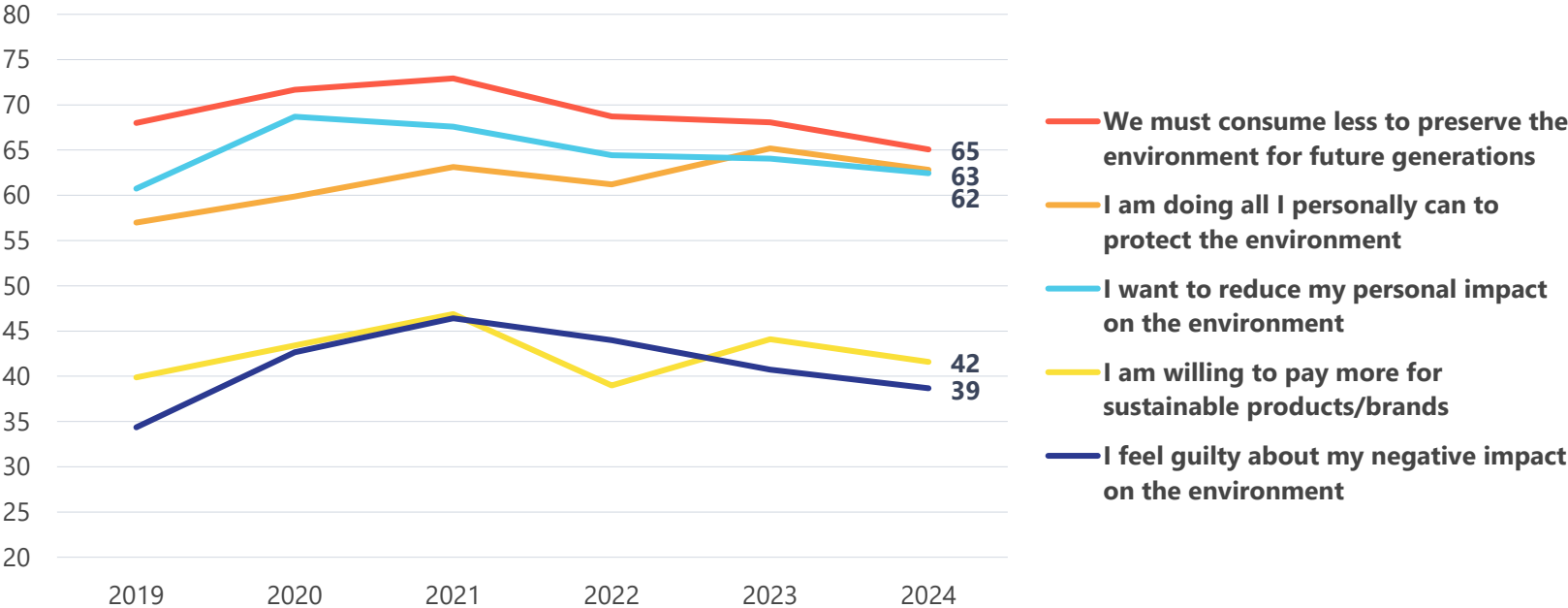
"Strongly" and "Somewhat Agree," Canada vs Global, 2024



Environmental attitudes have remained relatively stable since 2021, after increasing during the pandemic

Environmental Attitudes

"Strongly" and "Somewhat Agree," Canada, 2019–2024



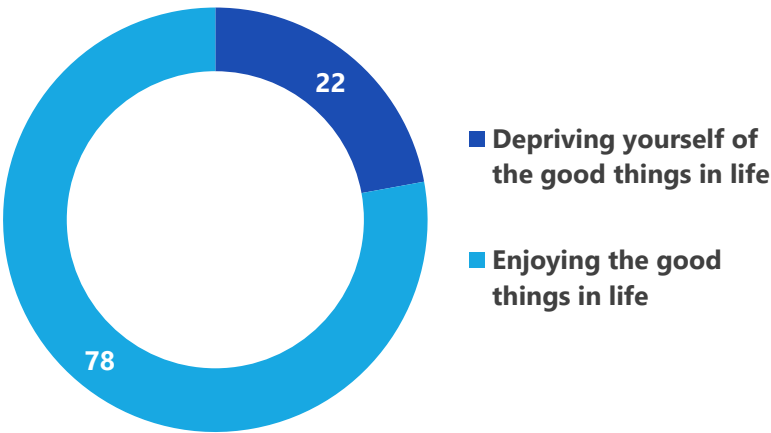
People in Canada tend to feel that healthy and sustainable lifestyles are enjoyable rather than restrictive



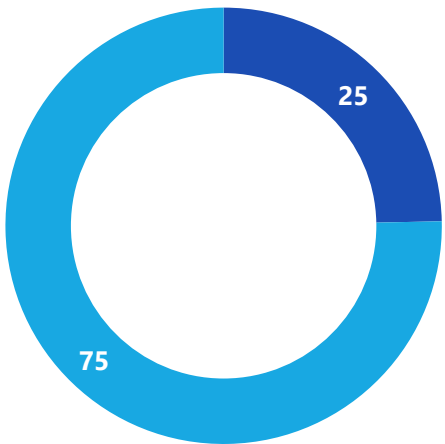
Are Healthy and Sustainable Lifestyles Seen as Attractive or Restrictive?

Canada, 2024

Living a **healthy** lifestyle means...



Living a **sustainable** lifestyle means...



21 Q68. Which of the following is closest to your opinion?
Q69. Which of the following is closest to your opinion?

Seven in ten Canadians believe that products will become more expensive due to climate change within the next decade

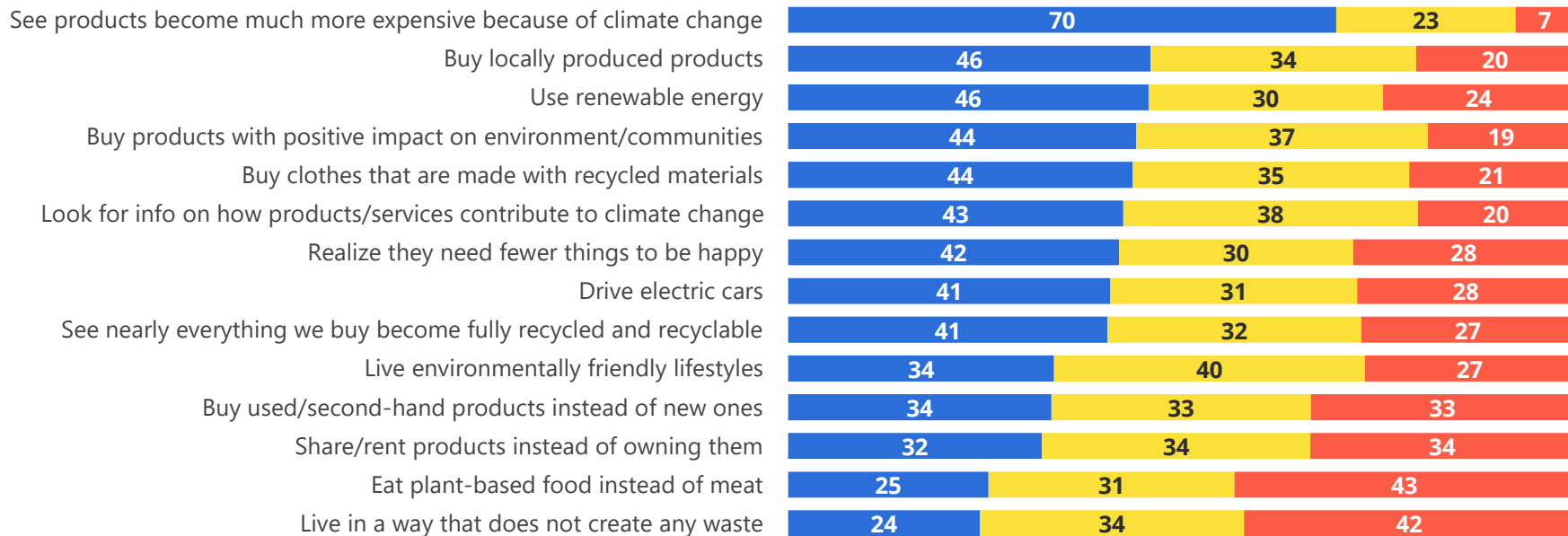


Attitudes toward a Sustainable Future

Canada, 2024

**In the next ten years,
most people will...**

■ **Definitely/probably WILL happen** ■ **Hard to say** ■ **Definitely/probably will NOT happen**



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Sustainable Behaviors

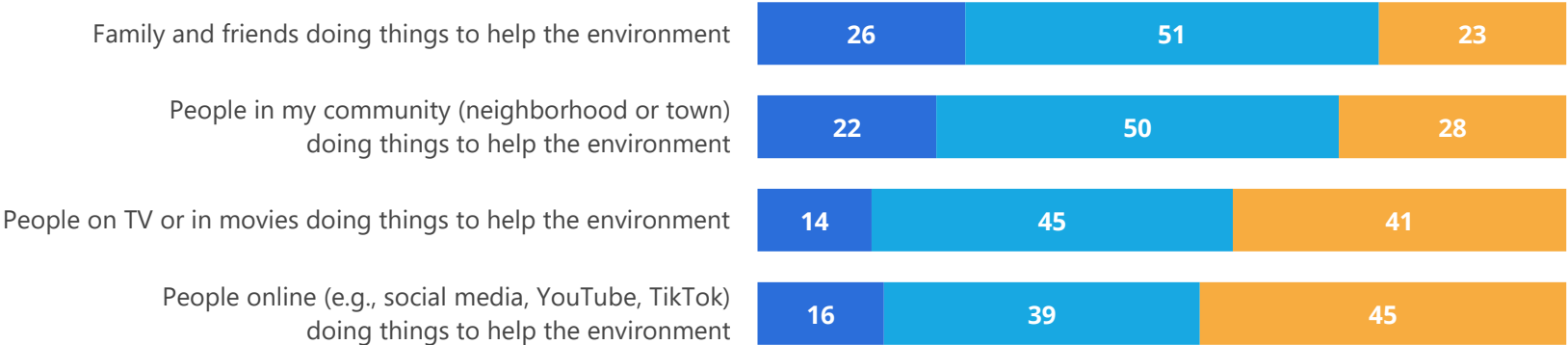
People in Canada have infrequent exposure to sustainable behaviors from those around them or in the media



Exposure to Sustainable Behaviors

Canada, 2024

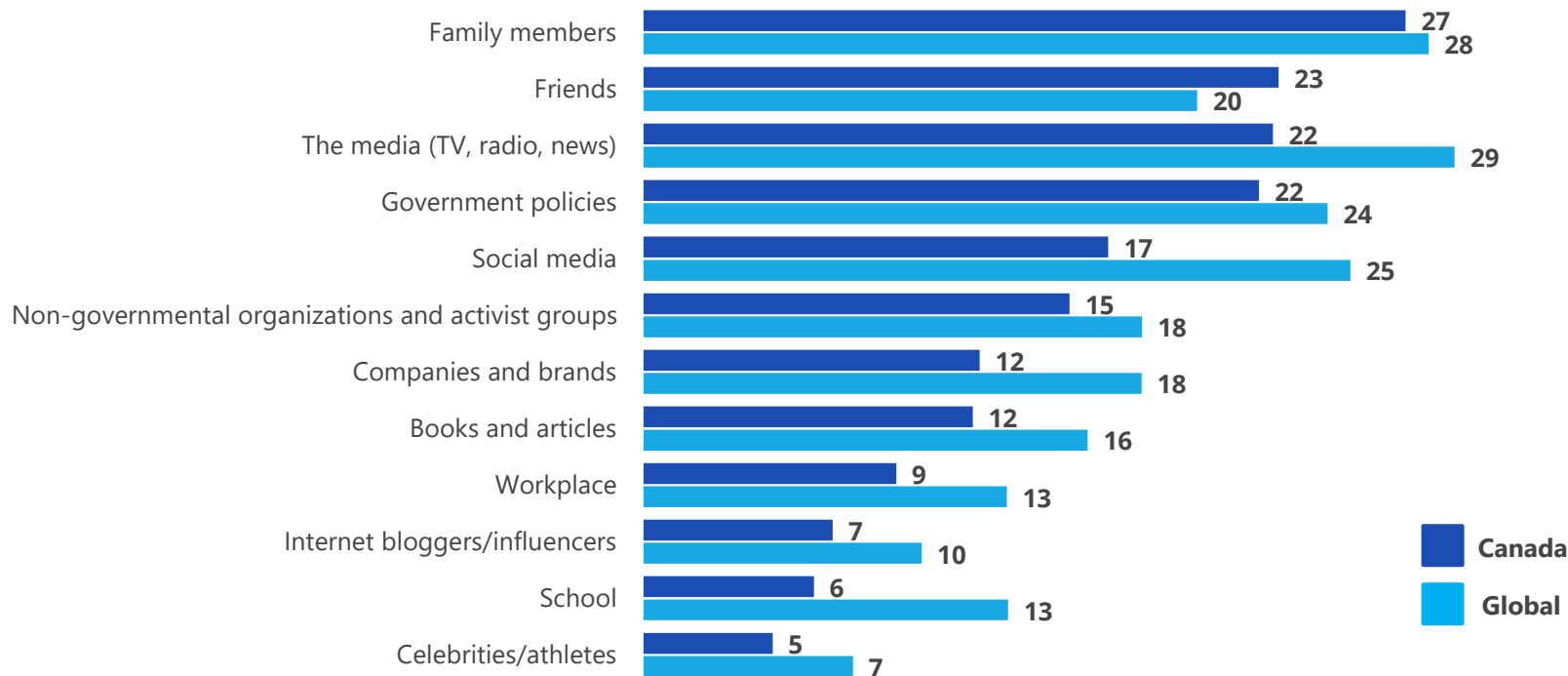
■ Most/all of the time ■ Sometimes ■ Never/rarely



Canadians are mostly influenced by family to be more sustainable, and less likely to be influenced by traditional and social media than global average

Sustainable Lifestyle Influencers

Total Mentions, Canada vs Global, 2024

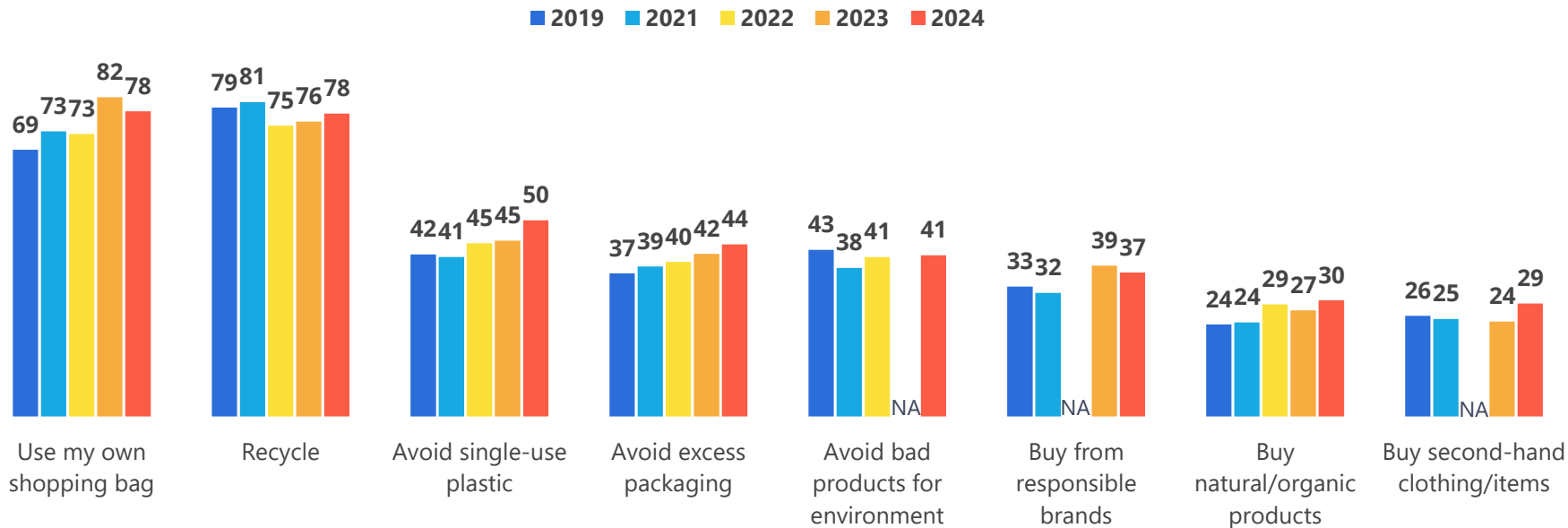


Canada
Global

The frequency of Canadians engaging in circular behaviors has generally increased or held steady since 2019

Frequency of Circular Behaviors

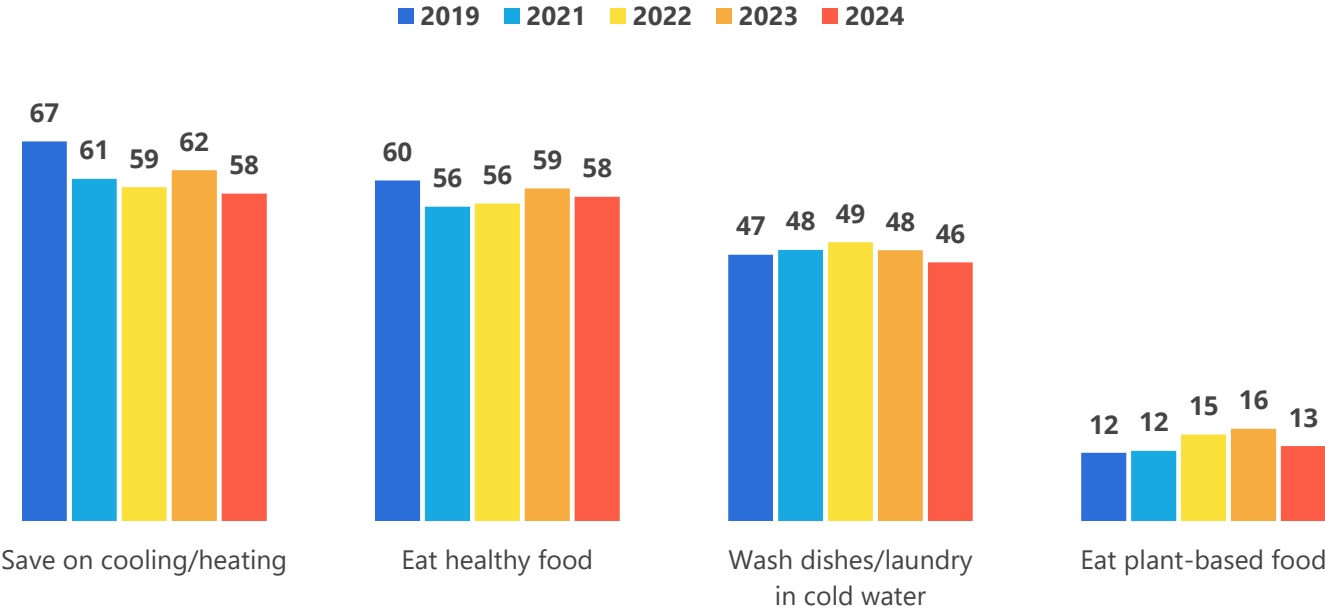
"Most" and "All of the Time," Canada, 2019–2024



People in Canada have become less likely to save on cooling/heating compared to five years ago

Frequency of Other Sustainable Behaviors

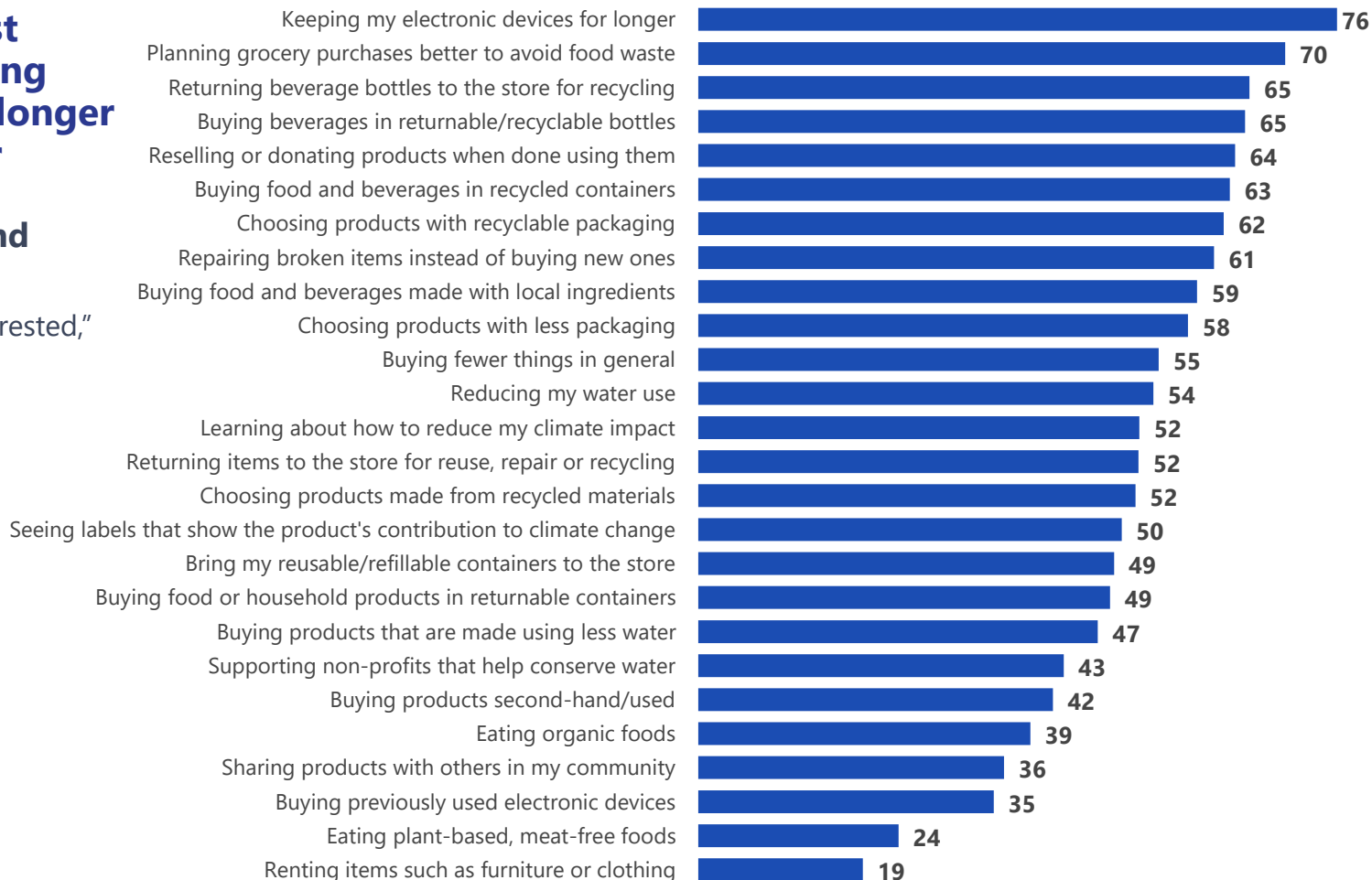
"Most" and "All of the Time," Canada, 2019–2024



Canadians are most interested in keeping electronic devices longer in the coming year

Interest in Healthy and Sustainable Actions

"Extremely" and "Very Interested,"
Canada, 2024



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Sustainable Purchasing

Canadians have become slightly more likely to report having made a sustainable purchase compared to 2022, most opting for cleaning products



Most Recent Sustainable Product Type Purchased

Canada, 2024

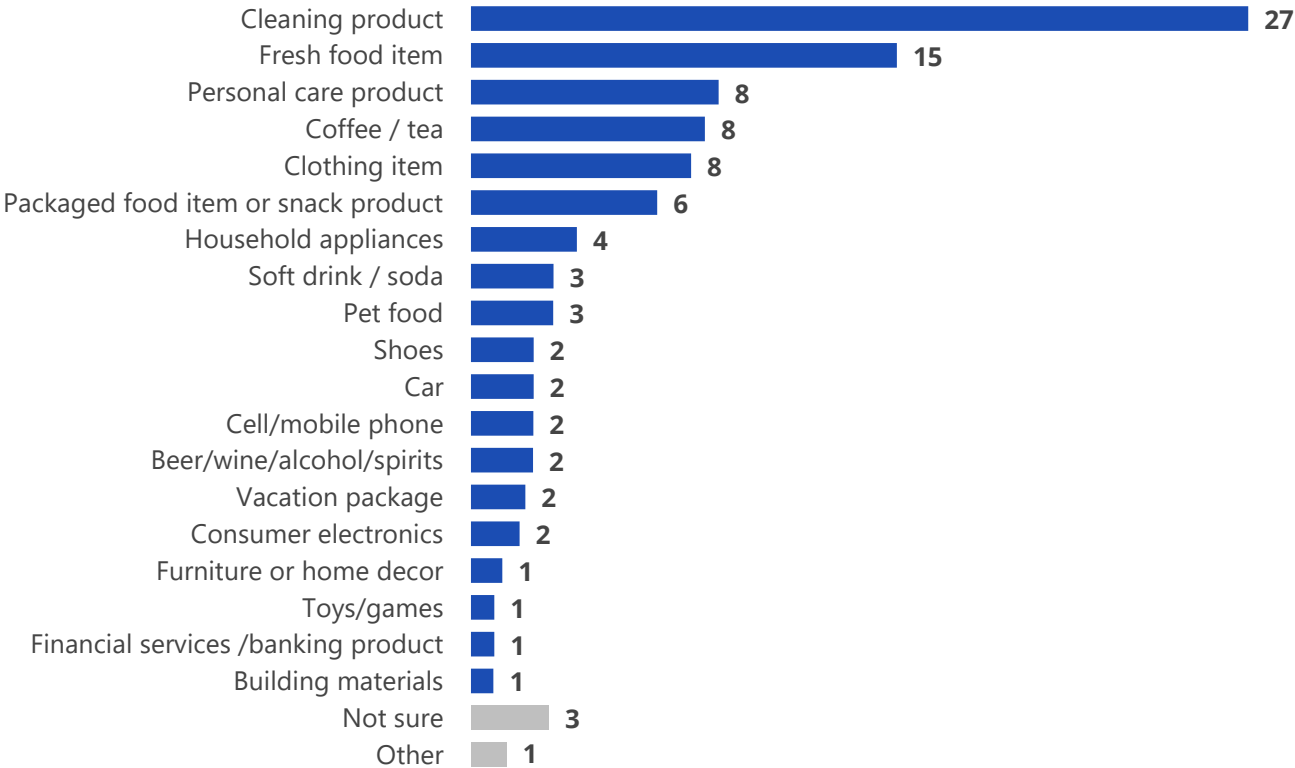
41%

(38% in 2022)

say they have **bought an environmentally friendly product** in the past month

vs

50% of people globally



30 Q44. Have you bought an environmentally friendly product in the past month?
Q45. What type of environmentally friendly product did you buy? Please choose one for the most recent product you bought.

Consumers in Canada say they tend to look at certifications or labels, followed by recycled/recyclable packaging, to identify sustainable products



How Consumers Know Products Are Sustainable

Subsample: Those Who Have Recently Bought a Sustainable Product, Canada, 2024



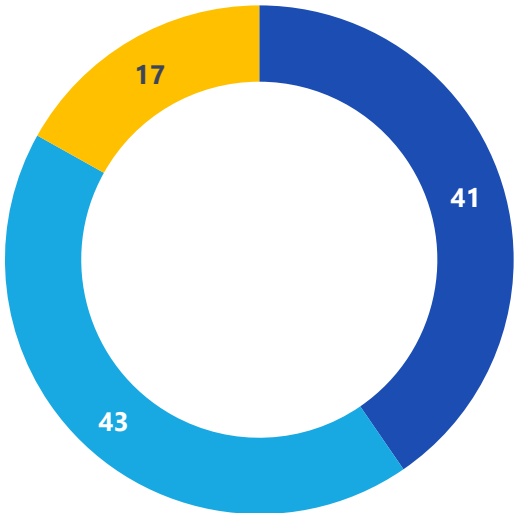
Four in ten Canadian consumers say they have recently bought a sustainable product; slightly more did not make a purchase but would have liked to



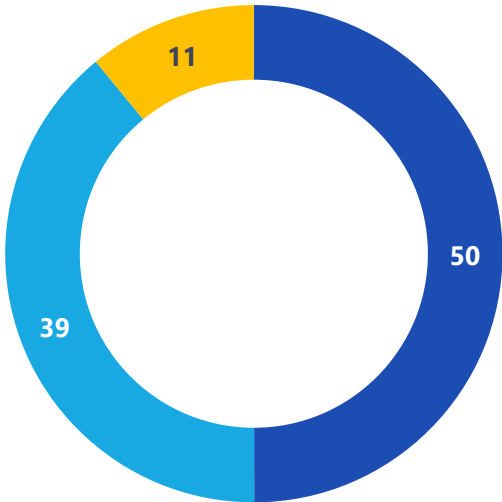
Sustainable Product Purchase in Past Month

Canada vs Global, 2024

Canada



Global

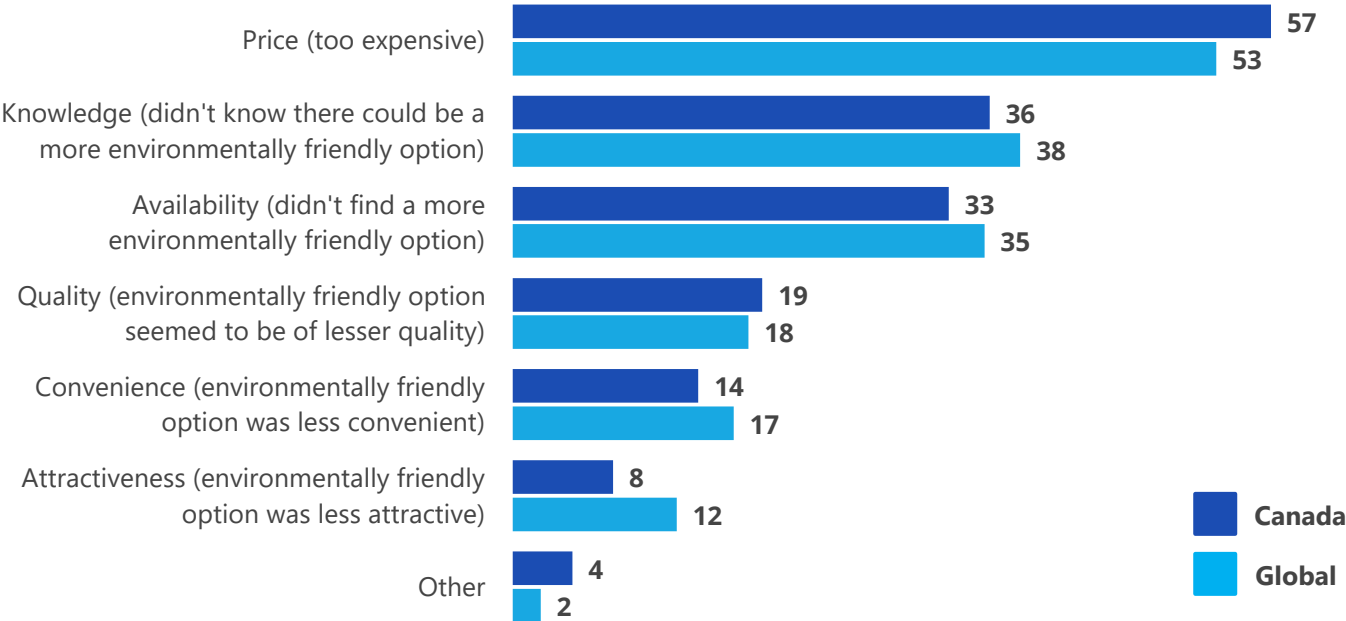


- Yes, purchased sustainable product
- No, did not purchase sustainable product but would have liked to
- No, did not purchase sustainable product and did not want to

Price is the top barrier among consumers in Canada who did not buy a sustainable product but would have liked to

Non-purchasers' Reasons for Not Buying a Sustainable Product

Subsample: Those Who Did Not But Would Have Liked to Buy A Sustainable Product, Total Mentions, Canada vs Global, 2024

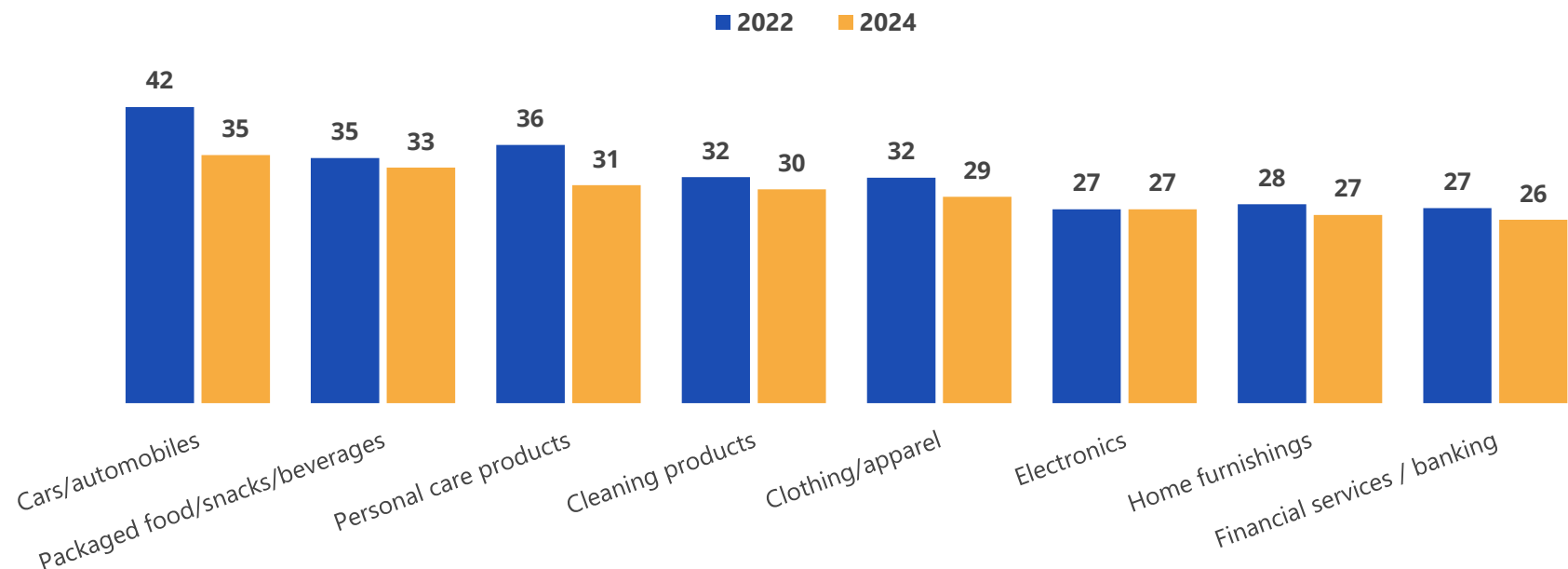


Canadians perceive a decrease in the quality of sustainable cars and personal care products when compared to 2022



Perceived Performance of Sustainable vs Regular Products

"Much" and "Somewhat Better," Canada, 2022–2024



Note: In 2022 Packaged food/snacks/beverages was asked as Packaged food/beverages

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Appendix

Methodology Summary



- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in Brazil and USA) ($n=30,216$).
- Samples are representative of online population, weighted to reflect general population census data.
- Online surveying in July and August 2024.
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.

Fieldwork Details

Country/territory	Sample size	Fieldwork
Argentina	1,006	July 18 th to August 9 th
Australia	1,002	July 8 th to July 17 th
Brazil	1,502	July 18 th to August 12 th
Canada	1,005	July 18 th to August 8 th
China	1,014	July 18 th to August 8 th
Colombia	1,008	July 18 th to August 7 th
Egypt	1,057	July 17 th to August 8 th
France	1,001	July 17 th to August 8 th
Germany	1,002	July 18 th to August 9 th
Hong Kong	501	July 18 th to August 14 th
India	1,002	July 7 th to July 23 rd
Indonesia	1,003	July 17 th to August 8 th
Italy	1,004	July 17 th to August 5 th
Japan	1,005	July 17 th to August 6 th
Kenya	503	July 8 th to July 19 th
Mexico	1,003	July 18 th to August 11 th

Country / territory	Sample size	Fieldwork
Netherlands	1,003	July 18 th to August 11 th
Nigeria	502	July 8 th to July 21 st
Peru	1,005	July 18 th to August 8 th
Portugal	1,011	July 18 th to August 12 th
Saudi Arabia	1,011	July 17 th to August 19 th
Singapore	502	July 8 th to July 18 th
South Africa	1,002	July 8 th to July 21 st
South Korea	1,002	July 17 th to August 14 th
Spain	1,004	July 17 th to August 6 th
Sweden	1,002	July 18 th to August 14 th
Thailand	1,018	July 18 th to August 8 th
Türkiye	1,011	July 18 th to August 19 th
UK	1,006	July 1 st to July 22 nd
USA	1,513	July 8 th to July 21 st
Vietnam	1,006	July 17 th to August 14 th

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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.

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