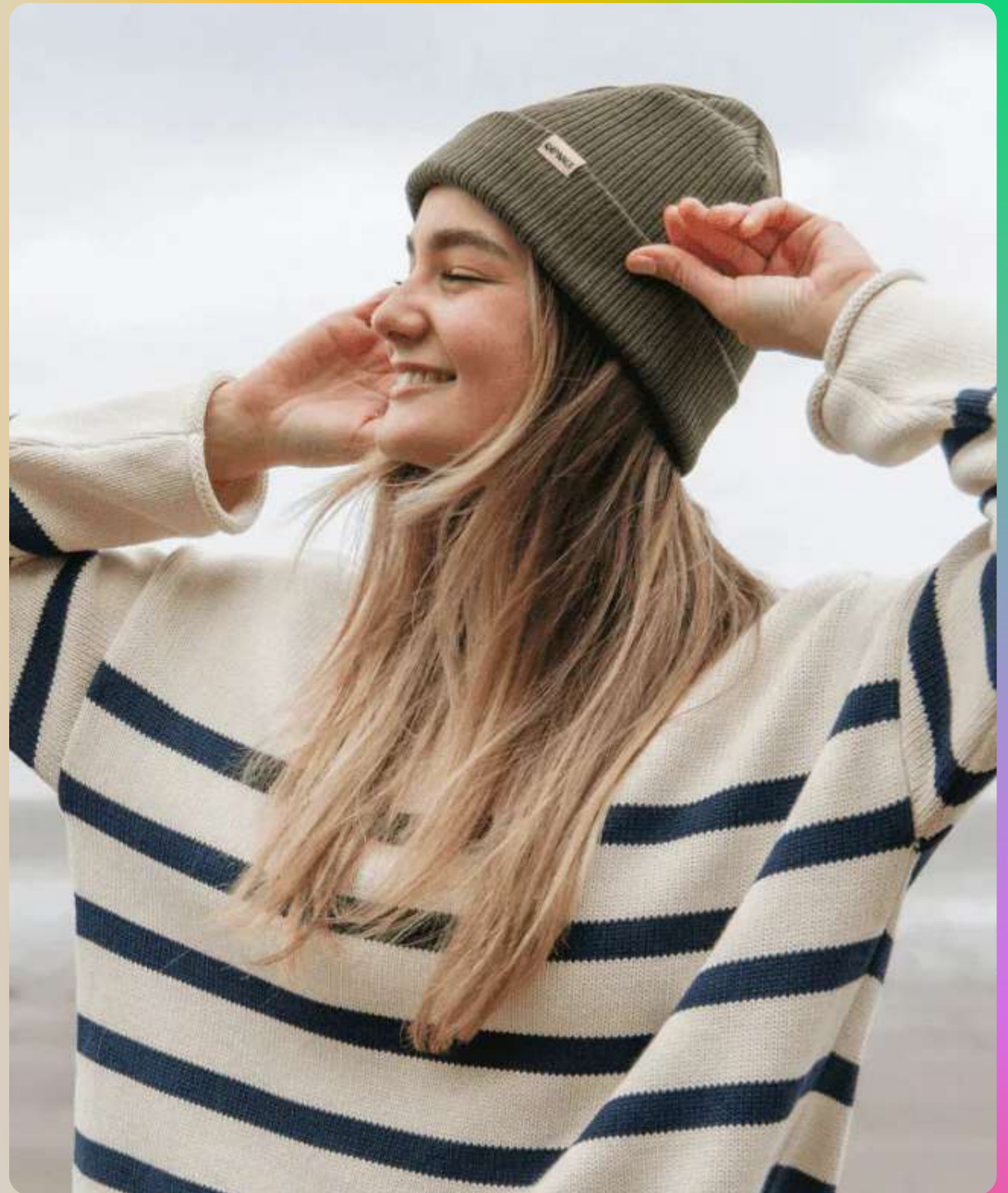


From Anxiety to Agency

Five Ways Sustainable Brands Can Win Back Gen Z



The Gen Z Dilemma

New research from GlobeScan and BBMG highlights the Gen Z dilemma: despite feeling the most impacted by climate change and expressing the highest levels of environmental concern, young people are becoming increasingly disengaged.

77%

of Gen Z in the USA are
inactive or indifferent
to sustainable behaviors

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A Next Gen Crisis?



Picture this: A teenager stares at their phone, paralyzed by headline after headline about the climate crisis, political dysfunction, and societal division. They want to act but feel overwhelmed by the sheer scale of the problem. This scene plays out millions of times daily, and it represents a critical challenge for brands: 80 percent of Gen Z globally report being personally affected by climate change, yet their engagement with sustainable solutions is declining. Looking to the future, many young people are asking, “What’s the point?”

Instead of feeling empowered to act, young people are becoming paralyzed by anxiety, overwhelmed by complexity, disillusioned by a lack of leadership, and increasingly disconnected from the very solutions they seek. This isn't just anecdotal. It's a pattern we're seeing globally, and it challenges everything we thought we knew about young consumers and sustainability.

80%

of Gen Z globally report being personally affected by climate change, yet their engagement with sustainable solutions is declining

The Aspirational Paradox

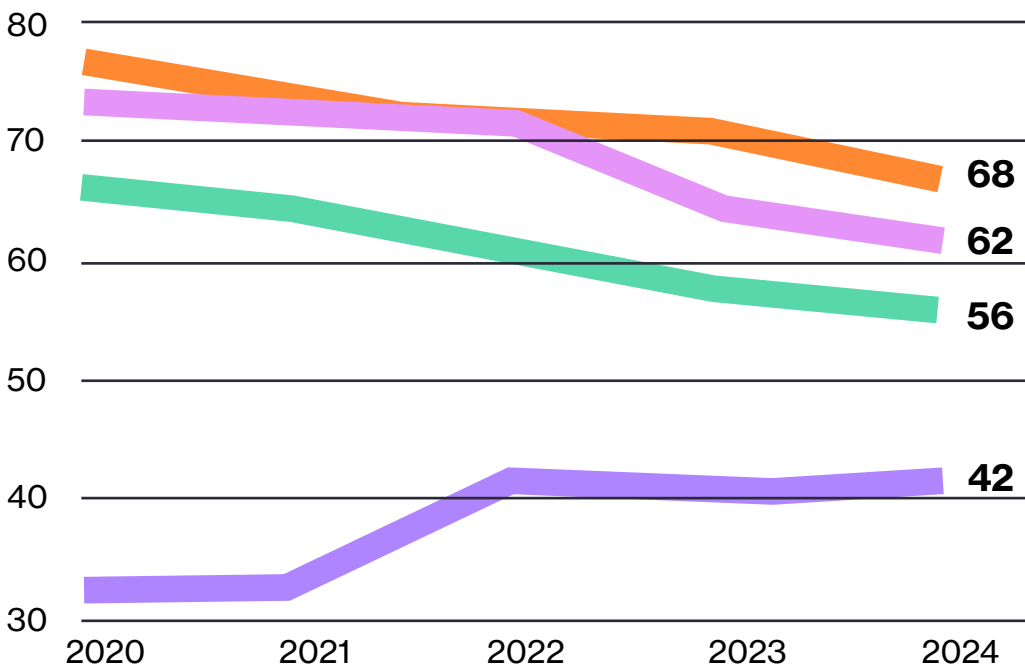
In 2015, we identified the rise of the “Aspirational Consumer” – a youthful, values-driven segment hungry for brands that unite performance, purpose, and new possibilities for the role of business in society. A decade later, many of these Aspirationals are now parents and remain the most committed to sustainable living. In fact, our latest research of over 30,000 consumers across

31 markets shows that they're significantly more likely to engage in sustainable purchasing behaviors across categories.

But something has shifted with the next generation. Despite feeling the most impacted by climate change and expressing the highest levels of environmental concern, young people today are becoming increasingly disengaged.

Environmental Attitudes

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



- I want to reduce my personal impact on the environment
- We must consume less to preserve the environment for future generations
- I feel guilty about my negative impact on the environment
- I believe that individuals cannot do much to save the environment

Awareness Meets Overwhelm



Around the world, Gen Z is significantly more likely than Baby Boomers and older to say they've been “greatly affected” by climate change (49% vs 38%, respectively), yet their engagement with sustainable behaviors is declining. The number of Gen Z globally who feel “indifferent” about sustainability has increased from 22 percent to 31 percent since 2021, while “enthusiasts” have dropped from 30 percent to 21 percent.

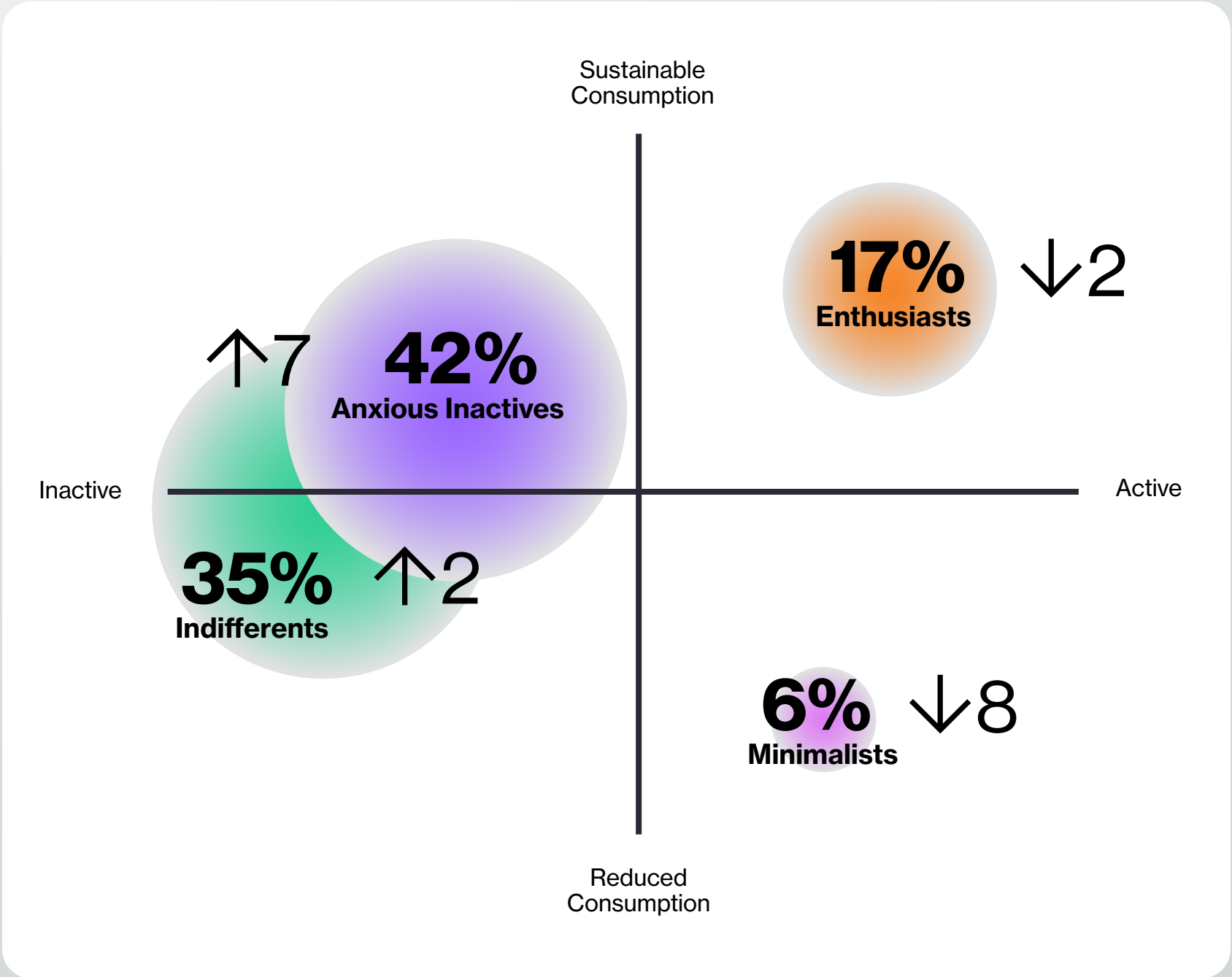
This isn't because they don't care. If anything, they care too much. Consider this: **38 percent of Gen Z globally say they feel stressed or anxious “all” or “most of the time”** – a full 21 points higher than Baby Boomers+. American youth are also more stressed than their global peers (44% vs 38%, respectively). We're witnessing what happens when awareness meets overwhelm. When anxiety paralyzes action. When good intentions collide with practical barriers. The generation with the most at stake in a sustainable future is feeling a lack of agency to shape it and feels that their actions won't even matter.

Gen Z Is Increasingly Disengaged

Sustainable Living Spectrum 2024–2025

To better understand the shifting dynamics at play, we conducted a new segmentation analysis that revealed four key segments based on their beliefs and behaviors related to sustainable consumption. **77% of Gen Z in the USA are inactive or indifferent to sustainable behaviors.**

- Point differentiation:**
- **Anxious Inactives:** Up 7 points
 - **Indifferents** Up 2 points
 - **Enthusiasts:** Down 2 points
 - **Minimalists:** Down 8 points



Engaging Different Sustainability Mindsets

Each consumer segment has distinct concerns and beliefs that brands can address to shift more of the next generation toward sustainable behaviors.



Enthusiasts are the most environmentally conscious and empowered segment and are highly engaged in sustainable behaviors and sustainable purchasing. The unlock for Enthusiasts involves the excitement of new sustainable products and services, showcasing how sustainability can offer better and different experiences.



Minimalists (over represented in the USA and Europe) tend to be less active and express their environmentalism by focusing on decreased personal consumption and reducing their footprint in ways that also save money. The key to engaging Minimalists is to focus on products, services, and behaviors that help reduce their impact in an affordable way.



Anxious Inactives are environmentally conscious and feel a significant amount of guilt and anxiety about their negative impact on the environment, but they believe that individual actions have limited impact and are relatively disengaged. This segment has the largest 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.



Indifferents are the least environmentally conscious segment and believe that individuals cannot do much to save the environment. To reach Indifferents, showing personal benefits such as saving money without overemphasizing sustainability is the most effective method.

The Hidden Opportunity

These compounding trends are all too familiar: climate anxiety creating paralysis, mental health challenges driving escapism, and economic pressure forcing trade-offs with social media amplifying short-term thinking. Without visible leadership or meaningful opportunities to act, young people are losing faith in the commitment of business and brands to deliver a sustainable future.

But here's where it gets interesting: while a whopping 77 percent of Gen Z in the USA currently falls into “inactive” and “indifferent” segments, two-thirds of those who did not buy sustainable products in the last month say they would have done so if they could have. **The desire for better choices exists, but barriers — like price, knowledge, and availability — block the path between intention and action.**

This represents both a crisis and an opportunity. For brands committed to remaining relevant to the next generation while building resilience for a world in flux, this moment demands a fundamental shift in how we approach sustainability.



2/3

of Gen Z in the USA who did not buy sustainable products in the last month say *they would have done so if they could have.*

Five Ways to Win Back Gen Z

Drawing on decades of research in psychology and social science – including Human Agency Theory, Dialectical Behavioral Therapy, and Self-Determination Theory – we've identified **five core principles** that transform sustainability from obligation into opportunity. Each principle bridges the gap between intention and impact, helping brands move from incremental progress to transformative change.



Lead with Truth



Create Connection Loops



Weave New Stories



Make Power Personal



Invite Joy

Lead with Truth

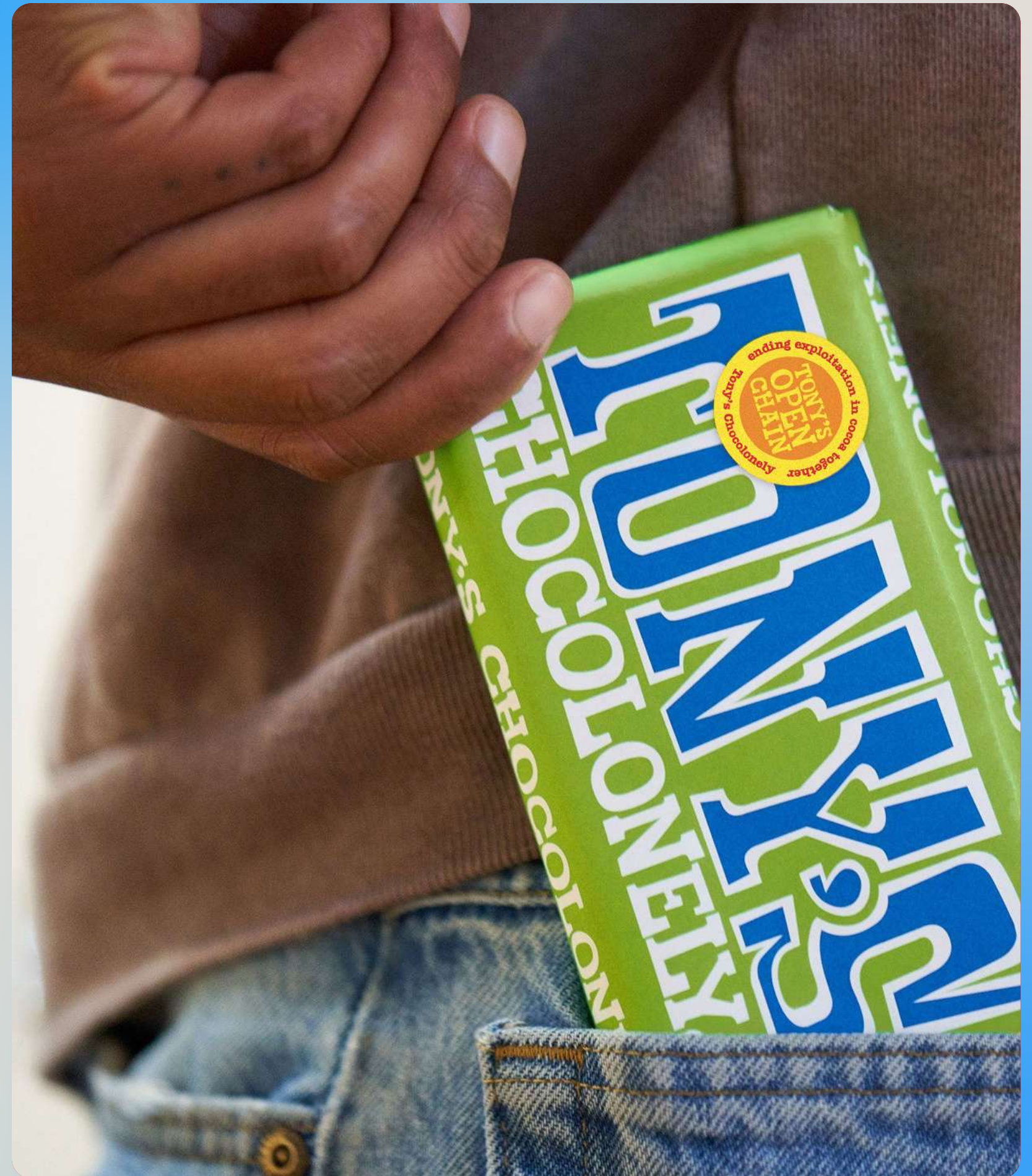
Facing challenges with radical honesty and bold imagination turns hard truths into creative possibilities.

60%

**of Gen Z in the USA
feel extremely worried**

about current and future harm to the environment caused by human activity and climate change

David Bowie was right then, and it's still true today: young people are "quite aware of what they're going through." **Sixty percent of Gen Z in the USA feel "extremely worried about current and future harm to the environment caused by human activity and climate change,"** and they are much more likely to say global problems are "very serious" compared to Baby Boomers+, including **unemployment** (+37 points), **unfair treatment of workers** (+29 points), ethnic, racial, or religious **discrimination** (+26 points), and **human rights abuses** (+19 points).



Tony's Chocolonely



Oatly

Yet, when we face our challenges with radical honesty and bold imagination, brands can turn hard truths into creative possibilities. According to Marsha Linehan, the founder of Dialectical Behavioral Therapy, acknowledging difficulties actually increases optimism and supports resilience. Being honest about challenges helps build trust while illuminating pathways forward.

Companies like [Tony's Chocolonely](#) are confronting harsh realities like labor exploitation in their industries by making their supply chains traceable and transparent. [Oatly's](#) provocative messaging acknowledges difficulties while maintaining optimism. [Rapanui](#) helps customers see the exact journey of their clothes. And [Seventh Generation](#) is honoring the origins of their name by redesigning their corporate foundation to champion community-led philanthropy focused on Indigenous sovereignty, climate justice, and environmental protection.

When brands are honest about challenges while offering solutions, they build credibility. Radical honesty builds deeper trust and more authentic relationships. And as the world gets more complicated and complex, sharing where we've been openly and honestly helps show where we need to go.



Rapanui

2 Make Power Personal

Focusing on small actions, immediate feedback, and clear impact boosts self-efficacy and unlocks momentum.

42%

of those aged 18–24 globally feel powerless to save the environment

Our beliefs about our own capabilities directly shape our actions. Psychologist Albert Bandura proved that this sense of self-efficacy is the foundation of human agency; when we believe we can meaningfully affect our circumstances, we're more likely to act.

But there's a crisis of agency among young people: when 42 percent of those aged 18-24 globally say they feel "individually powerless to do much to save the environment," they're expressing a state of helplessness that keeps us stuck, discouraged, and disempowered.



Trashie

#2 MAKE POWER PERSONAL

We can make power personal by transforming climate anxiety into creative agency and help people experience how taking small actions can spark immediate impact, unleash potential, and shape what's next. When consumers feel powerful, they're more likely to transform challenges into choices, repeat sustainable behaviors, and share brands with others.

Companies like **Sojo** are empowering consumers by making garment repair as convenient as food delivery. **The Ordinary** is democratizing high quality skincare with amazingly affordable prices. Beauty Counter's "**The Never List**" turns complex chemistry into clear decisions. And brands like **Bower** and **Trashie** make recycling clothes and other everyday items easy and rewarding.



Sojo



The Ordinary

By removing practical barriers while building psychological confidence, brands can help people move from feeling overwhelmed to feeling capable. Small actions, immediate feedback, and clear impact help unlock momentum. Because when consumers feel both empowered and enabled, they don't just make better choices – they become advocates for a new way of living.

Create Connection Loops

Building new relationships between people, products, and planet transforms sustainable living into meaningful community.

When anxiety gets in the way of individual action, community creates momentum. Our research reveals a powerful pattern: young people gravitate toward sustainable behaviors that create connection. In the USA, **Gen Z is significantly more likely than Baby Boomers+ to embrace collective consumption models** – from buying secondhand (+21 points) to choosing rentals over ownership (+16 points) and participating in reuse systems (+14 points).



Nuw



Notpla

Not only do circular models save money and reduce waste – they build the relationship between people, products, and the planet. When sustainability becomes social, anxiety transforms into shared purpose.

Consider **Notpla**, whose seaweed-based packaging alternatives aren't just eliminating plastic – they're building a community of restaurants and consumers

pioneering a plastic-free future together by bringing nature-based packaging into large-scale cultural events to promote learning and evangelism. Ireland's peer-to-peer clothes swapping platform **Nuw** builds local sharing communities by hosting hybrid digital and in-person events. And **Back Market** celebrates peer relationships and repair culture as the global marketplace for reborn tech.

These brands understand that lasting change happens in community with others. By creating connection loops, they're helping transform individual eco-anxiety into collective creativity – and making sustainable living less about sacrifice and more about belonging to something bigger than ourselves.



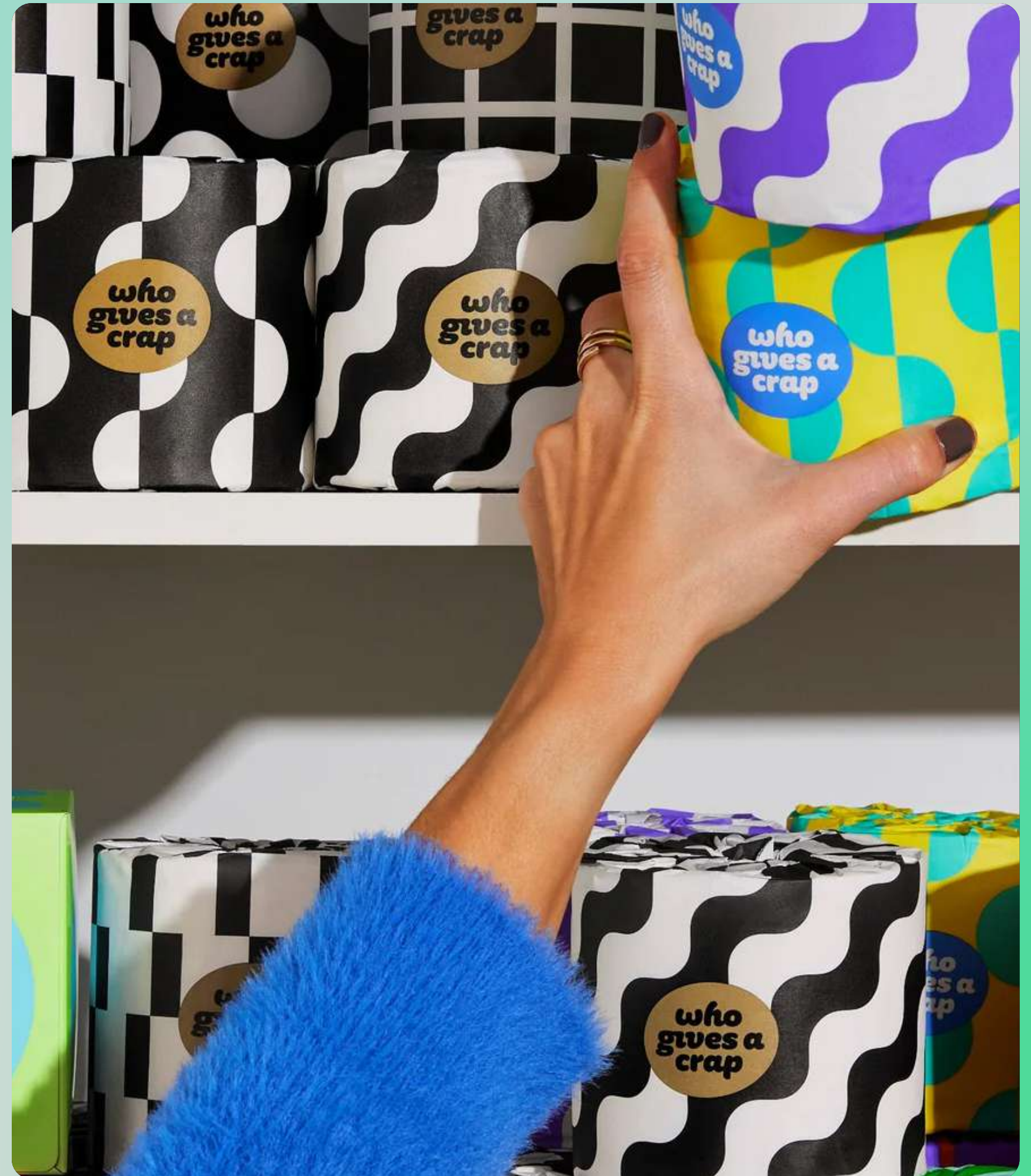
Back Market

Invite Joy

Enhancing positive emotions makes sustainability a source of wellbeing and joy.

When sustainability connects to fundamental human needs for joy, growth, and vitality, it becomes self-sustaining, especially in difficult times.

For psychologist Martin Seligman, the experience of human flourishing requires more than just removing negatives – it demands positive emotion, engagement, relationships, meaning, and accomplishment. When we focus the benefits of sustainability solely on reducing harm, we miss the opportunity to support genuine wellbeing.



Who Gives a Crap



Our research confirms this insight: **more than 75 percent of Gen Z globally views both healthy and sustainable lifestyles as "enjoying the good things in life"** rather than sacrifice. For them, sustainability isn't about having less – it's about living more fully.

Consider **Pangaia**, a collective of scientists, technologists, and designers using bio-based materials and bright colors for sustainable fashion that feels fresh, smart, and stylish, rather than austere. **NotCo** uses AI to create plant-based alternatives that replicate the flavor and texture of animal products in favorites like mac and cheese, hot dogs, and ice cream. And **Who Gives A Crap** transforms everyday paper products into playful, design-forward objects of joy while supporting global sanitation efforts.

75%

of Gen Z globally views both healthy and sustainable lifestyles as enjoying the "good things in life"

When sustainability contributes to all dimensions of wellbeing, it shifts from sacrifice to source of joy and gives brands new opportunities to increase relevance, differentiation, and loyalty.

Weave New Stories

Honoring both realities and aspirations makes sense of today and shows what's possible tomorrow.

77%

of Gen Z in the USA feels disconnected from current sustainability messaging

"The stories we tell about ourselves and the world become the lenses through which we see reality," notes the philosopher Charles Eisenstein. And when 77% of Gen Z in the USA feels disconnected from current sustainability messaging, we need new narratives that reconnect and re-engage.

And it's possible: our data show that despite the challenges young people are facing every day, they are significantly more optimistic about the future than their elders. Gen Z in the USA is much more likely than Baby Boomers+ to believe that in ten years, most people will be driving electric cars (51% vs 21%), buying secondhand (51% vs 21%, respectively), renting items instead of owning them (43% to 19%), and living waste-free (40% vs 15%).



Rare Beauty

#5 WEAVE NEW STORIES

This is a powerful moment to help young people write a new chapter and to tell stories that help make sense of today while showing what’s possible tomorrow. Stories that connect individual promise with collective purpose and help us see our part in redefining what comes next.

Vestiaire Collective understands this, making secondhand fashion feel aspirational and luxurious while building community around pre-loved style. Selena Gomez’s **Rare Beauty** is destigmatizing mental illness and fostering conversations around hope and agency. And **Too Good To Go** reimagines food waste as an opportunity for daily adventure. These brands aren't just selling products – they're helping people see their role in a better story, one that unites individual wellbeing with collective flourishing.

Swap this...



NEW FAST FASHION TRENCH
COST PER WEAR : \$4.82

...for that.



PRE-LOVED LUXURY TRENCH
COST PER WEAR : \$0.89

Vestiaire Collective



Too Good To Go

By reflecting consumers’ realities and amplifying their aspirations, brands can weave new stories that shape our identities, build our communities, and shift culture for a more sustainable future for everyone.

From Insight to Action



The opportunity is clear but challenging. By designing products, services, and experiences that inspire confidence, deepen relationships, and build momentum toward healthy and sustainable living, brands can help transform sustainability from a source of anxiety into a path toward agency, creativity, and joy.

This isn't just about selling more stuff. It's about helping people express their values, connect with others, and participate in positive change. It's about making better choices feel less like sacrifice and more like possibility. The data show that young people are ready for this shift. They just need the truth, better tools, and a like-minded community to create it.

“Young people's eco-anxiety deserves a sacred space for mourning and fury, rather than dismissing their feelings as weakness or offering empty reassurances that everything will be fine,” says Ariana Gomez, an expert in eco-anxiety and Founder and CEO of Technology for Impact. **“Their deep care about the climate crisis is a powerful fuel for building a better future – yet they can only access this potential when we honor their emotions and support them through the process.**

We need to open the door and find ways to move forward together, equipped with tools and knowledge to help transform their grief into action.”

The time for incremental progress has passed. The next generation is calling for deeper transformation. Brands that can make sustainable living feel both honest and hopeful, aspirational and accessible, and unite individual wellbeing with collective flourishing will define the future of consumption – and help design a future with more joy and thriving.

This is about more than market share or brand relevance. It's about helping an entire generation move from anxiety to agency, from paralysis to purpose, from being overwhelmed to taking action. The tools exist. The demand is clear. The only question is: who will have the empathy and creativity to lead?

About Us

Methodology

The data in this report are from GlobeScan’s online survey in March 2025 of approximately 1,000 adults in the USA. Additional data come from GlobeScan’s global online survey in July–August 2024 of 30,000 people conducted across 31 markets with approximately 1,000 respondents per market. Samples are representative of online population, weighted to reflect general population census data.

Participating markets: Argentina, Australia, Brazil, Canada, China, Colombia, Egypt, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Netherlands, Nigeria, Peru, Portugal, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Thailand, Türkiye, UK, USA, and Vietnam.

About BBMG

BBMG is the independent brand consultancy helping mission-driven leaders find perspective and step into motion. We’re a collective of strategic creatives and creative strategists, culture experts and design thinkers who combine deep human insights, strategic vision and emotion-led design to build brands the world needs. BBMG is a Certified B Corporation based in Brooklyn, NY. To learn more about how we build Regenerative Brands, visit www.bbm.com



About GlobeScan

GlobeScan is an insights and advisory firm specializing in trust, sustainability, and engagement. We equip clients with insights to navigate shifting societal and stakeholder expectations, crafting evidence-based strategies that reduce risks and create value for their organizations 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.



Contributors

Raphael Bemporad
Chris Coulter
Liz Courtney
Ariana Gomez
Tove Malmqvist
Jess Pitera
Annie Yang

Photo Credits

Cover image by Rapanui
Nick Fancher
A.C.
Andrej Lisakov
Edward Cordoba Bastidas

Get in touch

hello@bbm.com
insight@globescan.com