

# From Anxiety to Agency

Five Ways  
Sustainable Brands  
Can Win Back Gen Z

GlobeScan 

BBMG

 EARTH  
GUARDIANS





# **Welcome!**

**In the chat, please share your thoughts:**

How are the young people  
in your life doing right now?

# Hello!



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# Today's Conversation

- **Welcome:** Sharing Our Stories
- **Next Gen Research:** The Gen Z Dilemma
- **Five Ways to Win Back Gen Z:** Principles & Practices
- **Q&A:** Discussion
- **Resources:** Sharing Our New Report



# The Gen Z Dilemma





# Global Views

Public Opinion  
Research in the USA  
and Around the World

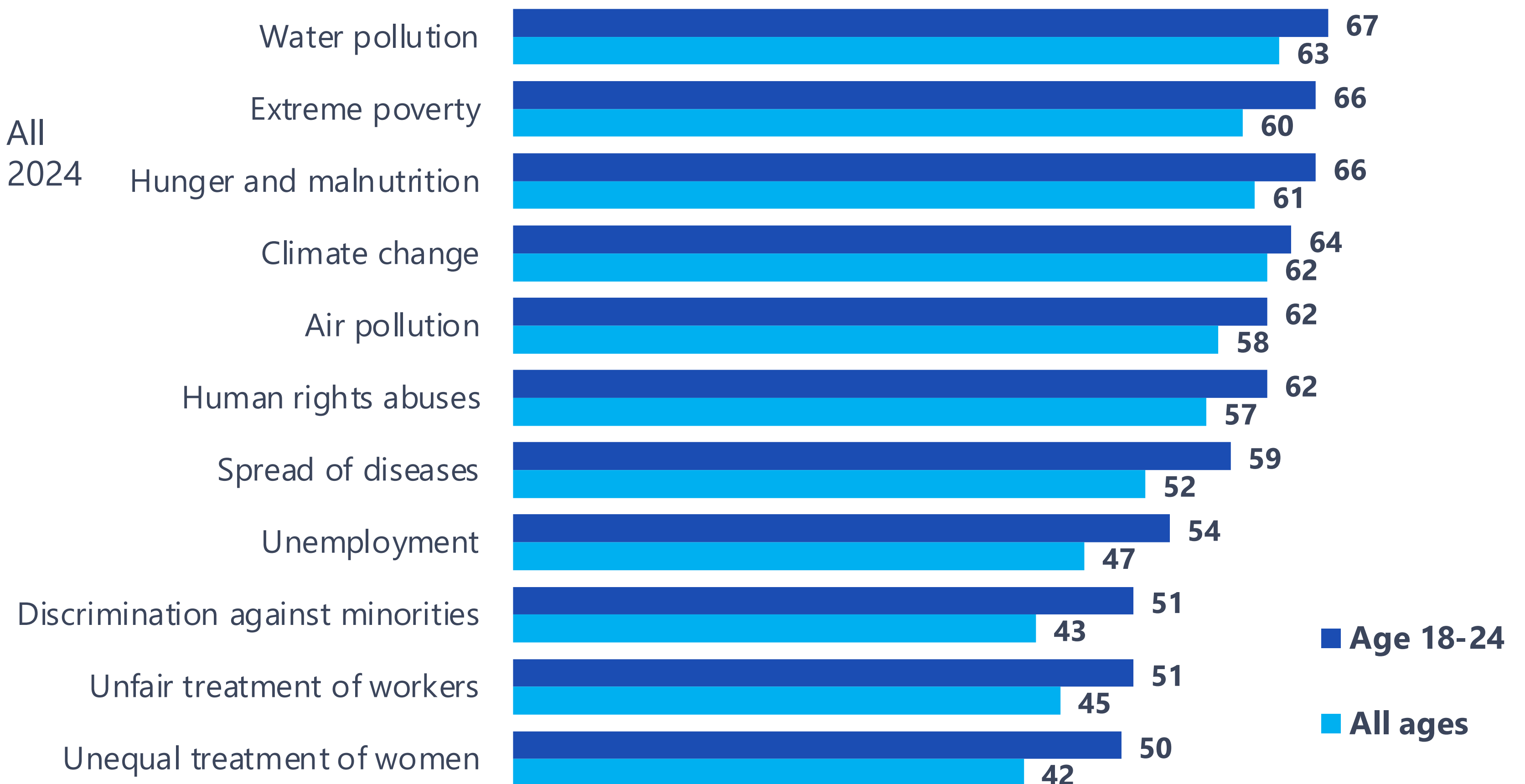
August 2024 Survey  
Across 31-Markets  
(n=30,000)



## Young people are more concerned about all issues!

### Perceived Seriousness of Global Problems

"Very Serious," Ages 18-24 vs All  
Ages, Average of 31 Markets, 2024

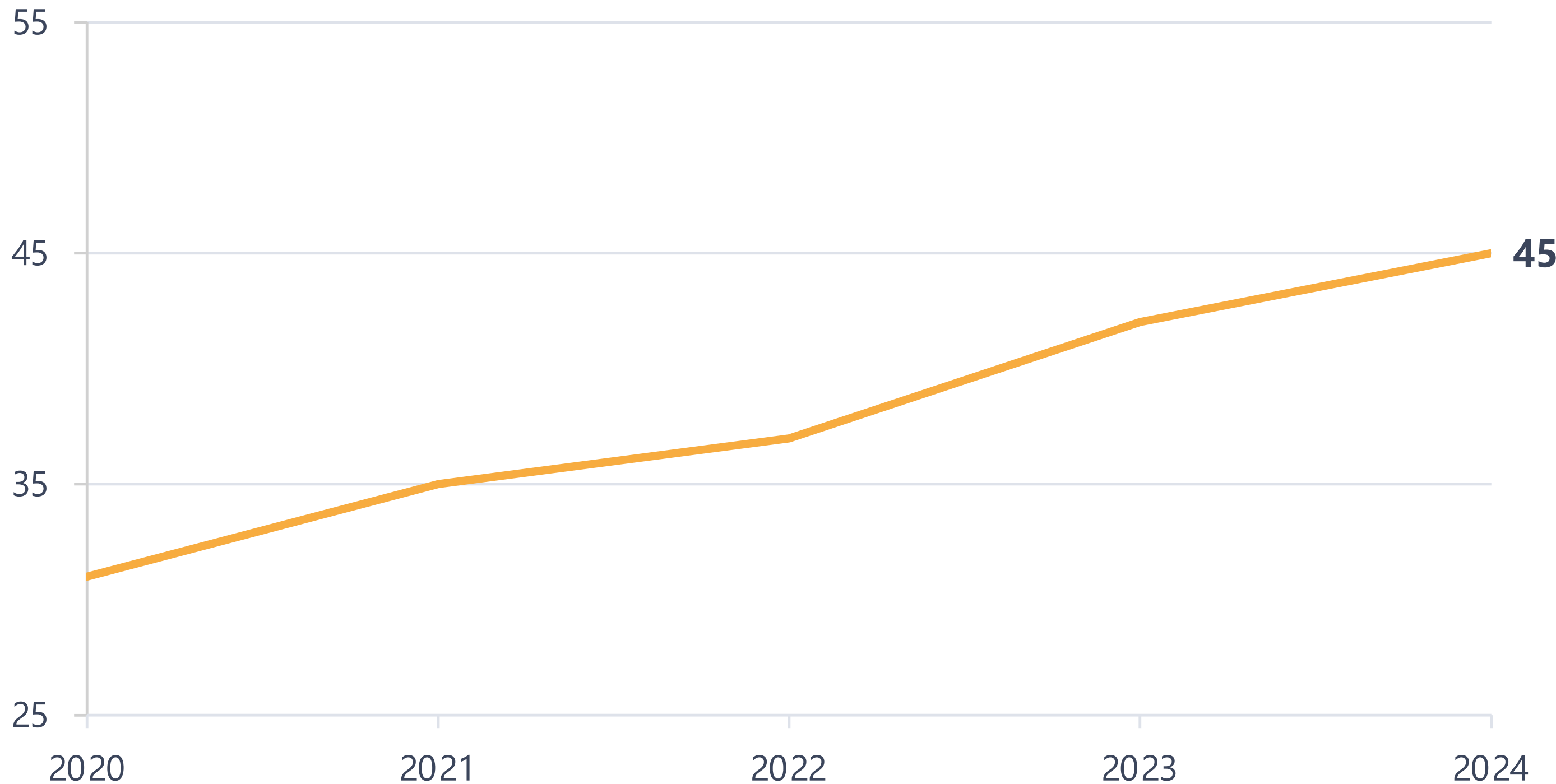


T1. For each of the following possible *global* problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

# People of all demographics continue to be increasingly affected by climate change

## Extent Personally Affected by Climate Change

"Greatly Affected," Average of 26 Countries,\* 2020–2024



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

T2. How much are you personally affected by each of the following? – Climate change or global warming

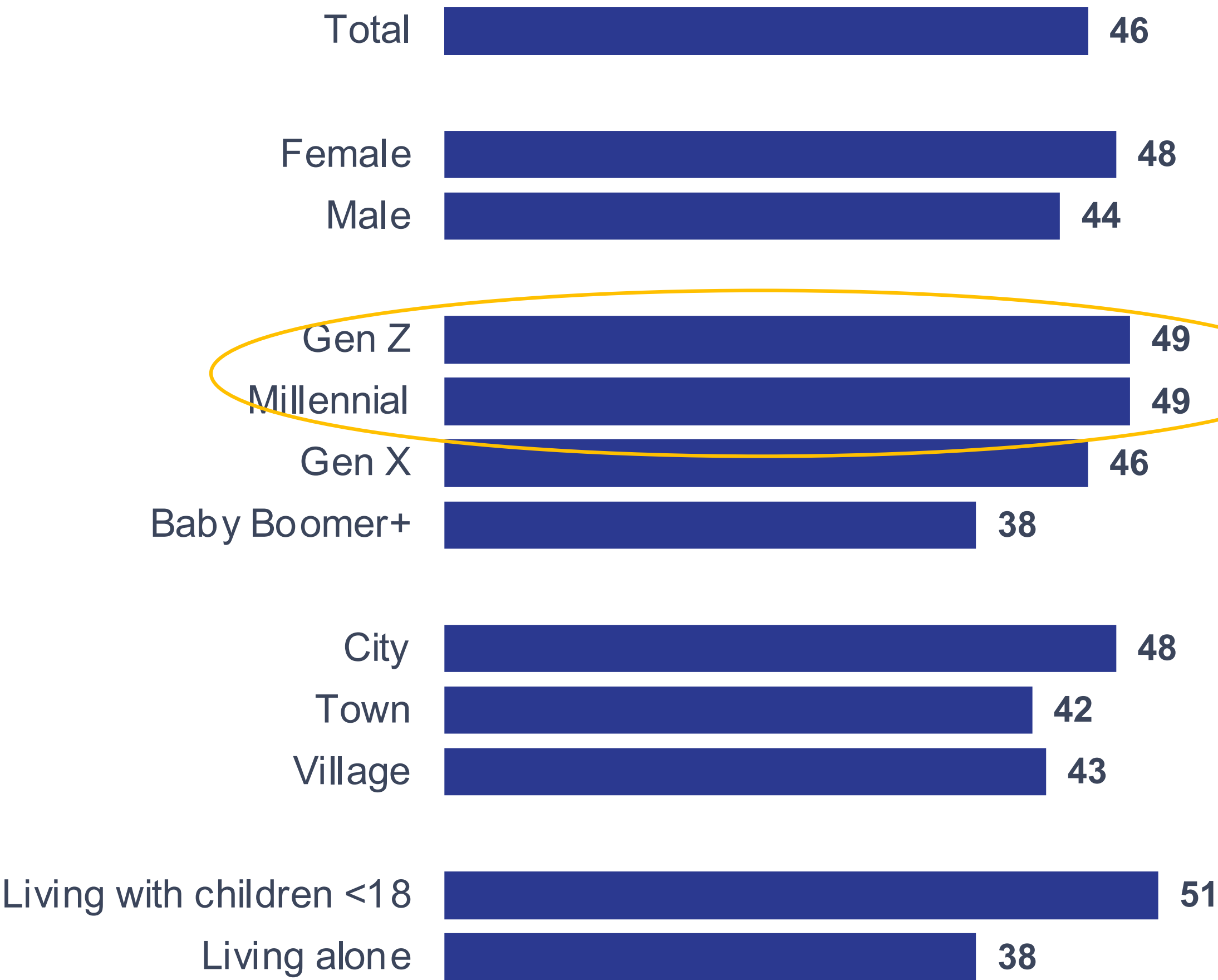


...but young people are among those that are most likely to say that they are greatly affected



Extent Personally Affected by Climate Change

“Greatly Affected,” by Demographics, Average of 31 Markets, 2024



T2. How much are you personally affected by each of the following? – Climate change or global warming

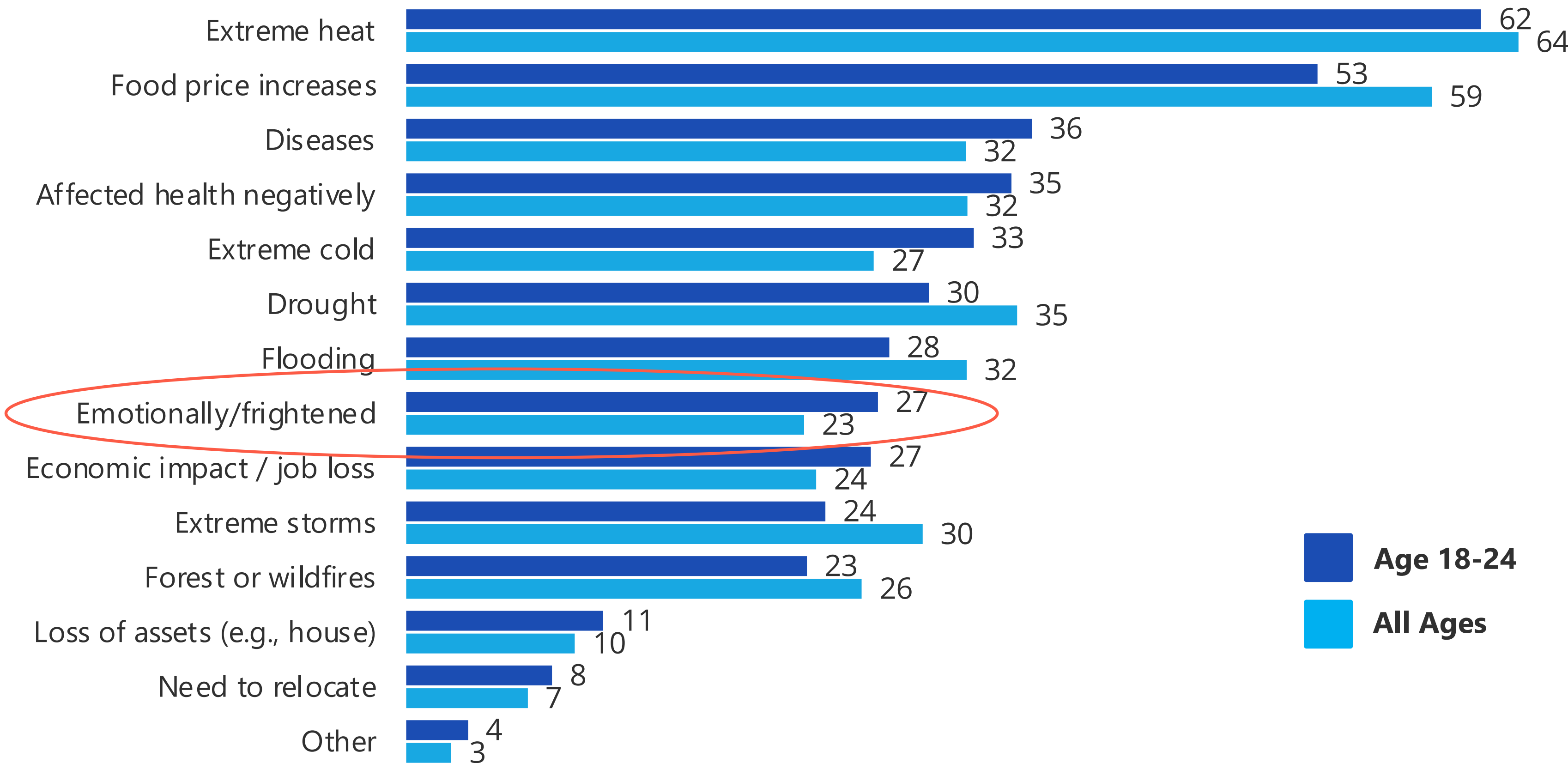




# Young people are also more likely to say they have been emotionally impacted by climate change, feel frightened

## How People Have Been Affected by Climate Change

Subsample: Those Who Are Greatly/Moderately Affected by Climate Change, Ages 18-24 vs All Ages, 2024



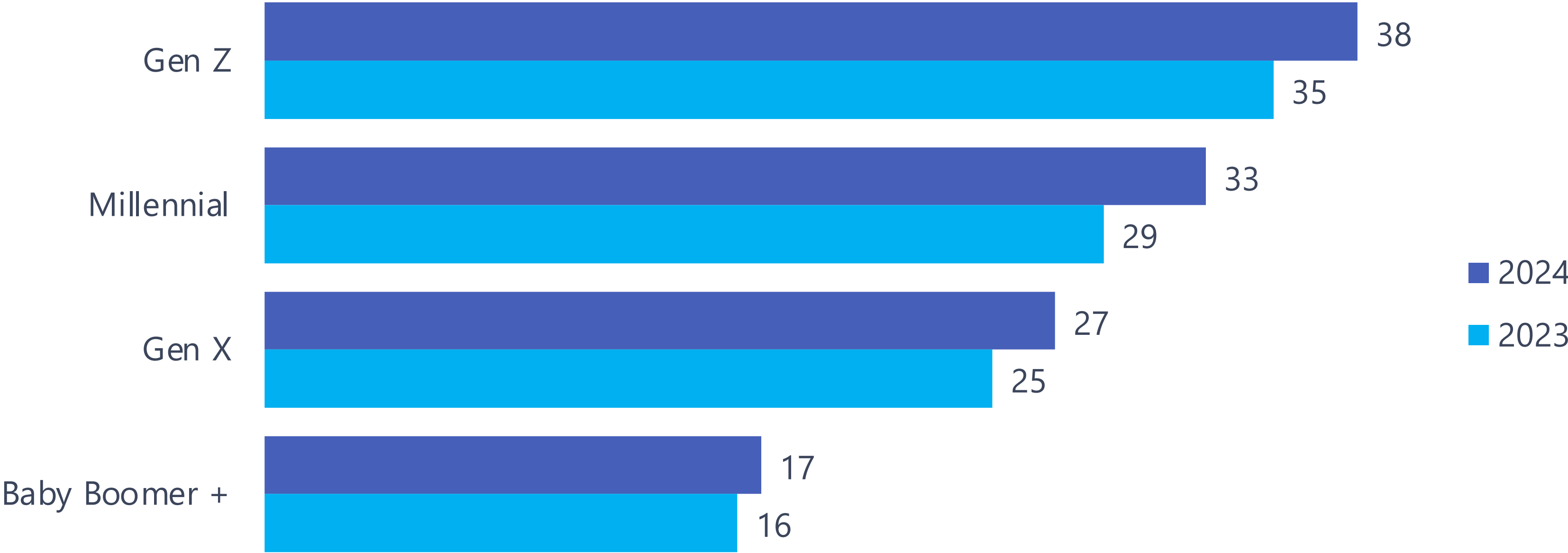
T31. How have you been affected by climate change? Choose all that apply.



# The younger people are, the more likely they are to say they frequently feel stressed or anxious, and their anxiety increasing

## Frequency of Feeling Stressed/Anxious

"Most" and "All of the Time," by Generation, Average of 31 Markets, 2024



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. – I feel stressed or anxious.

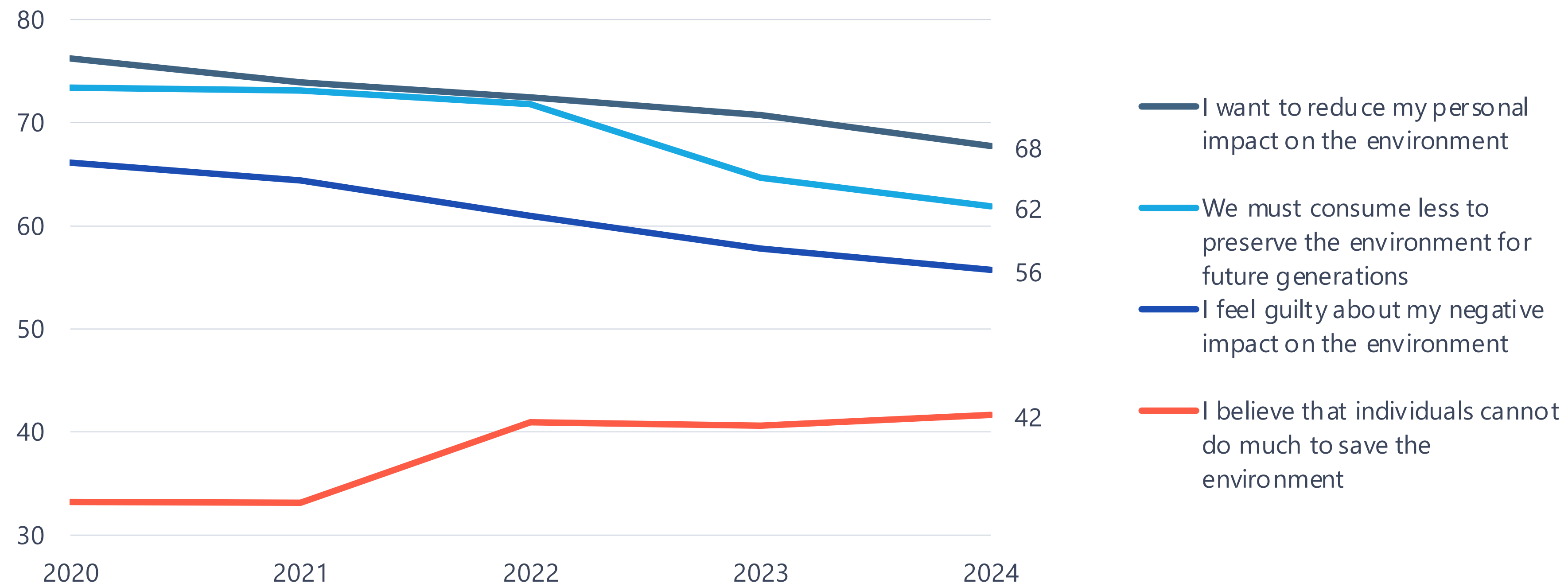


# Trends show that young people are becoming increasingly disengaged and disempowered



## Environmental Attitudes

"Strongly" and "Somewhat Agree," Ages 18-24, Average of 31 Markets, 2019–2024



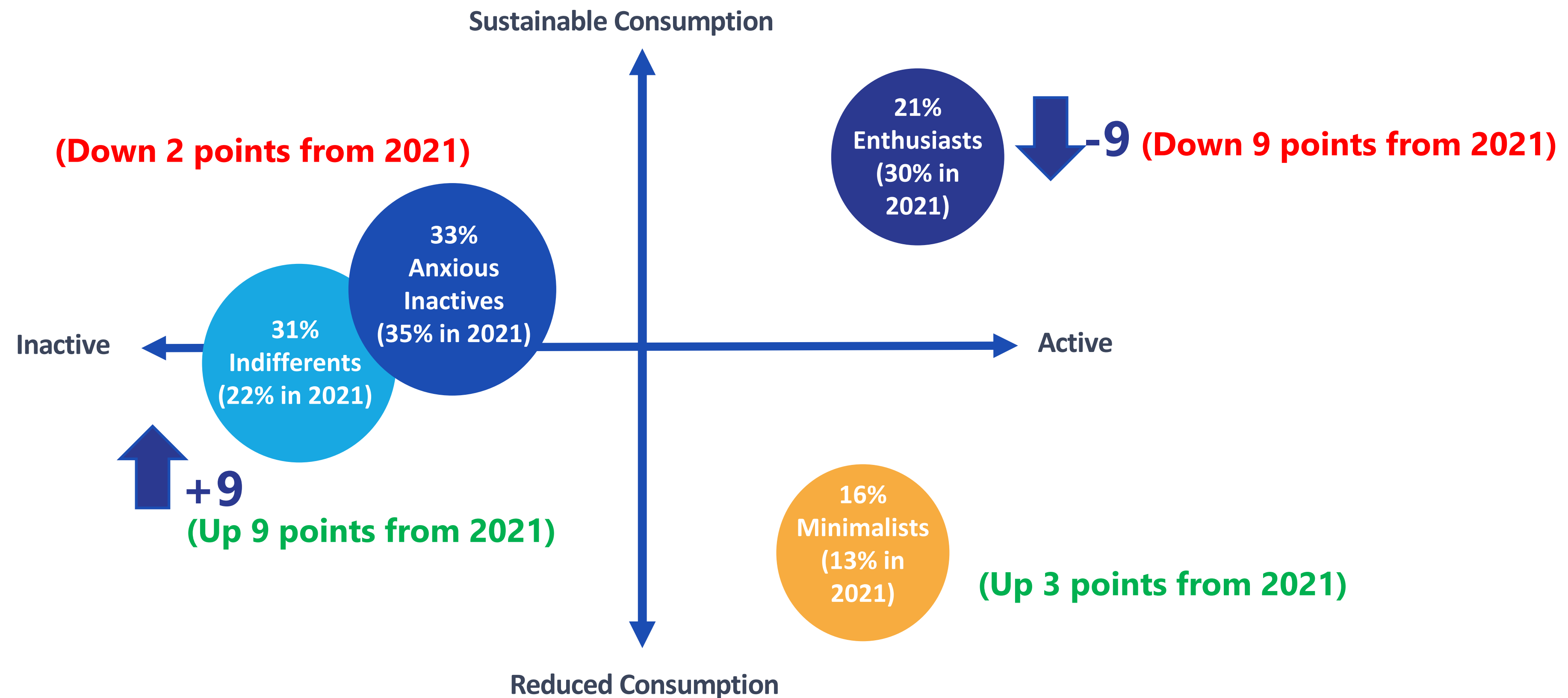
Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree with each of the following statements. – I believe individuals cannot do much to save the environment.





# This movement towards indifference is more pronounced among Gen Z – the two inactive segments now comprise 64% of Gen Z

Gen Z, Average of 31 Markets, 2021–2024





# American Views

Flash poll of American consumers updating insights on key aspects of the corporate sustainability agenda

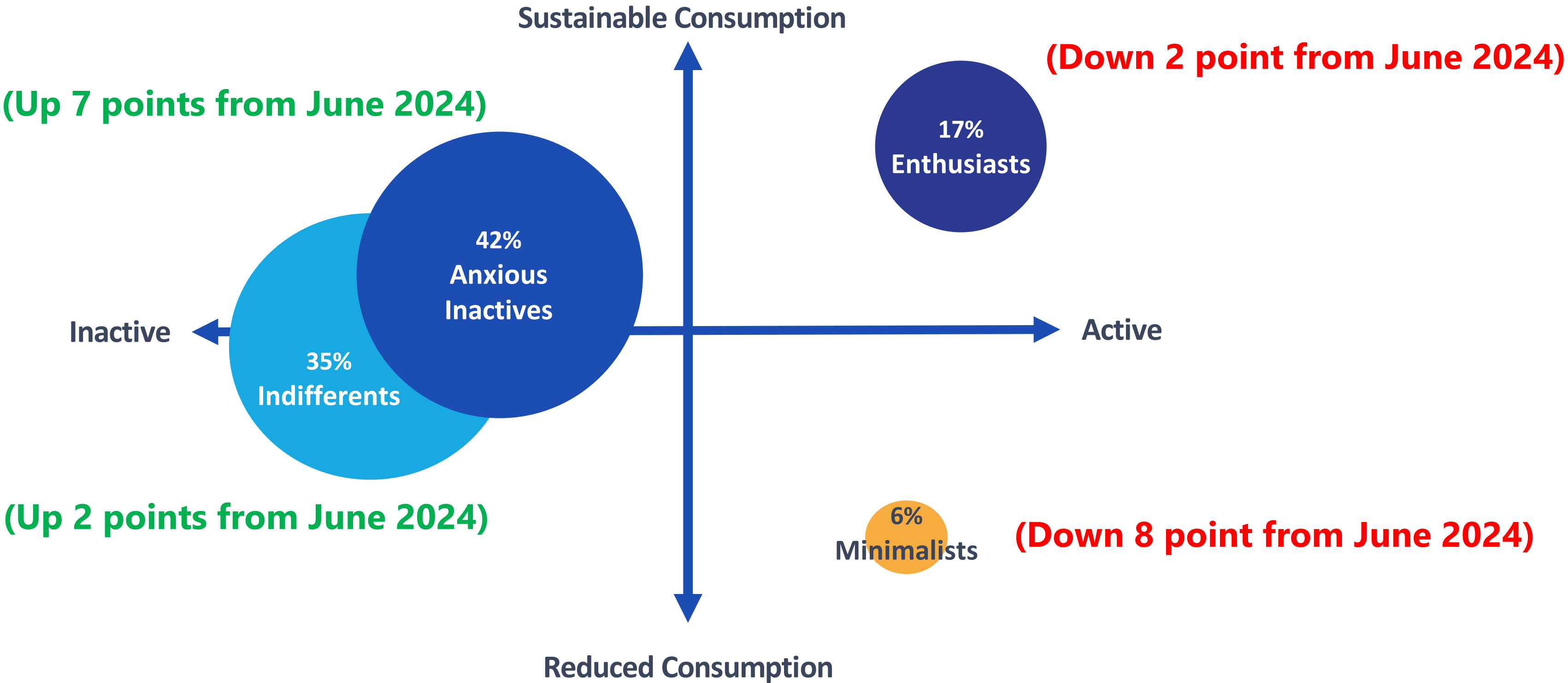
March 2025



However, segmentation based on attitudes show American Gen Z becoming less activated but remaining anxious about the environment



USA, Gen Z, 2024-2025

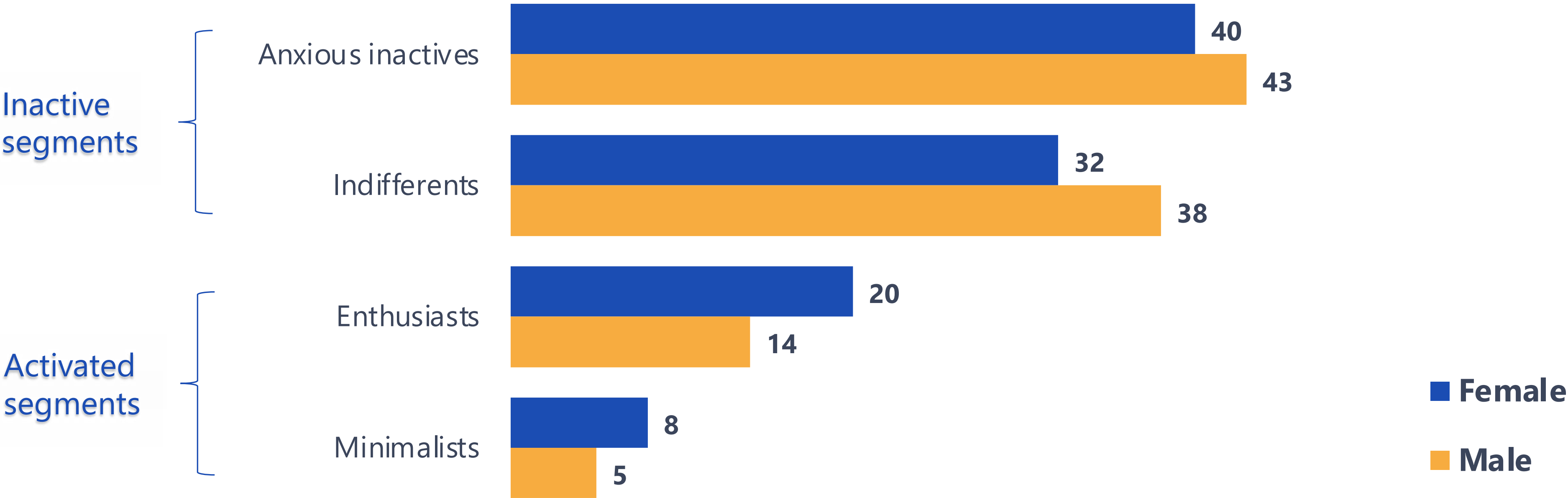




# American Gen Z women are more likely than men to be Enthusiasts, 81% of Gen Z males are now in inactive segments (vs 72% females)



USA, **Gen Z**, Segments by Gender, 2025



# Gen Z are more likely than average to have purchased a sustainable product



## Environmentally Friendly Product Purchase in Past Month

USA, 2025



Q44. Have you bought an environmentally friendly product in the past month?  
Q73. Would you have liked to buy a product that was environmentally responsible, if you could have?

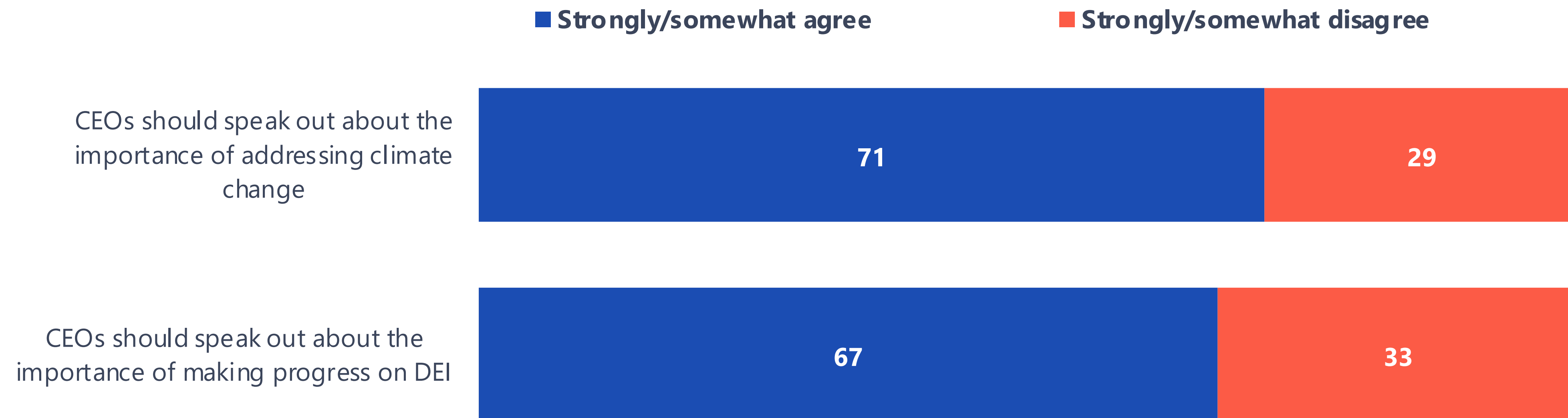




## Strong majorities of Americans also believe that CEOs should advocate on importance of DEI and addressing climate change

### Beliefs that companies and CEOs should have commitments on climate change and DEI

USA, 2025



T8. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

## Gen Z Americans are more convinced than the average that CEOs should advocate on importance of DEI as well as on importance of addressing climate change

### Beliefs that companies and CEOs should have commitments on climate change and DEI

USA, Total vs Gen Z, 2025



T8. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.



# Five Ways to Win Back Gen Z





# Lead With Truth

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



# Lead With Truth

**Tony's Chocolonely** is confronting the harsh realities of child labor in the chocolate industry by making their supply chain traceable and transparent.



**Oatly's** provocative platform – “F\*ck Oatly” – provides an archive of criticism the brand has received and uses humor to spotlight solutions.



**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.



# Make Power Personal

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



# Make Power Personal

**M&S partners with Sojo** to make garment repair as convenient as food delivery, helping clothing last longer, save money and reduce waste to landfill.



**The Ordinary** is democratizing high-quality skincare by stripping away the frills to ensure quality products are amazingly affordable.



**Bower** and **Trashie** make recycling clothing and other everyday items easy and rewarding by providing simple take-back systems paired with incentives from partner brands and charities.



# Create Connection Loops

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



# Create Connection Loops

Seaweed-based packaging company **Notpla** unites consumers, restaurateurs and sporting events like the UEFA Women's Euros to promote education, community and evangelism for a plastic-free future.



Ireland's peer-to-peer clothing swapping platform **Nuw** builds local sharing communities by hosting hybrid digital and in-person events.



**Back Market** celebrates peer relationships and repair culture as the global marketplace for reborn tech.



# Invite Joy

Enhancing positive emotions makes  
sustainability a source of wellbeing and joy



# Invite Joy

**Pangaia**, a collective of scientists, technologists, and designers, is using bio-based materials from food waste to create sustainable fashion that enriches ecosystems for an **Earth Positive Future**.



**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.



**Who Gives A Crap** transforms everyday paper products into playful, design-forward objects of joy – while donating 50% of profits to global sanitation efforts.



# Weave New Stories

Honoring both realities and aspirations helps  
make sense of today and shows what's  
possible tomorrow



# Weave New Stories

Selena Gomez's  
**Rare Beauty** is  
destigmatizing mental  
illness and fostering  
conversations around  
hope and agency.



**Too Good To Go** reimagines  
food waste as an opportunity for  
daily adventure.



**Vestiaire Collective** is making second-hand  
fashion feel aspirational and luxurious while  
building community around pre-loved style in their  
peer-to-peer, vintage and designer marketplace.



# Five Ways to Win Back Gen Z



**Lead with Truth**



**Create Connection Loops**



**Weave New Stories**



**Make Power Personal**



**Invite Joy**



# Discussion

- What are you noticing?
- What opportunities do you see?
- What questions are emerging?

# Thank You!

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