

Sustainability in the USA

What Consumers Think and Expect in 2025

A GlobeScan Snapshot of Enduring
Values and Evolving Expectations



April 2025



Globe
Scan

Introduction

In our decades of work on sustainability, we have rarely encountered such elevated uncertainty in the operating environment – a feeling echoed by many sustainability professionals today. In board rooms around the world, many are wondering what has changed, and what has not, on this agenda.

To better understand the current moment, we conducted a flash poll of 1,000 consumers in the United States from March 25th to 28th 2025, updating the key public opinion and consumer indicators we last measured in the summer of 2024.

These fresh data offer a timely snapshot of how American views on sustainability may be shifting – and just as importantly, where they remain steady. As companies navigate increasingly complex expectations, these insights provide a valuable guide to what matters most to the public right now.

Survey Methodology:

- **Representative online samples of approximately 1,000 adults in the USA ($n=1,004$).**
- **Samples are representative of online population, weighted to reflect general population census data.**
- **Online surveying from March 25th to 28th, 2025.**
- **Building on our annual survey (July 8th to 21st, 2024)**



Key Insights



Resiliency of sustainability values. Foundational concerns and values that Americans have held around environmental and social issues have remained constant during recent political and economic changes in the country. The resilience of these values suggests that societal opinion, one of the most important underpinnings of the transition to sustainability, remains intact.



Americans want companies to lead responsibly. The American public is highly supportive of companies speaking out on a number of sustainability and social issues. Companies with the savvy and conviction to meet consumer expectations can be more vocal around these issues and potentially improve brand trust.



A large opportunity remains for the sustainability-driven marketplace. GlobeScan's research shows that Americans remain interested in sustainable product offerings and that opportunity remains for companies and brands to give American consumers more access to products and services that align with their values.





1.

RESILIENCY OF SUSTAINABILITY VALUES

GlobeScan's long-term tracking of concerns about global issues and how much people feel impacted by climate change shows that Americans continue to feel similarly concerned about issues like climate change as they did before the election. Americans also continue to feel similarly affected by climate change as they did before the election, and their propensity to be willing to pay more taxes to limit climate change has not changed.

The resilience of these values suggests that societal opinion, one of the most important underpinnings of the transition to sustainability, remains intact.

Americans' Concerns about Issues Remain Largely Consistent

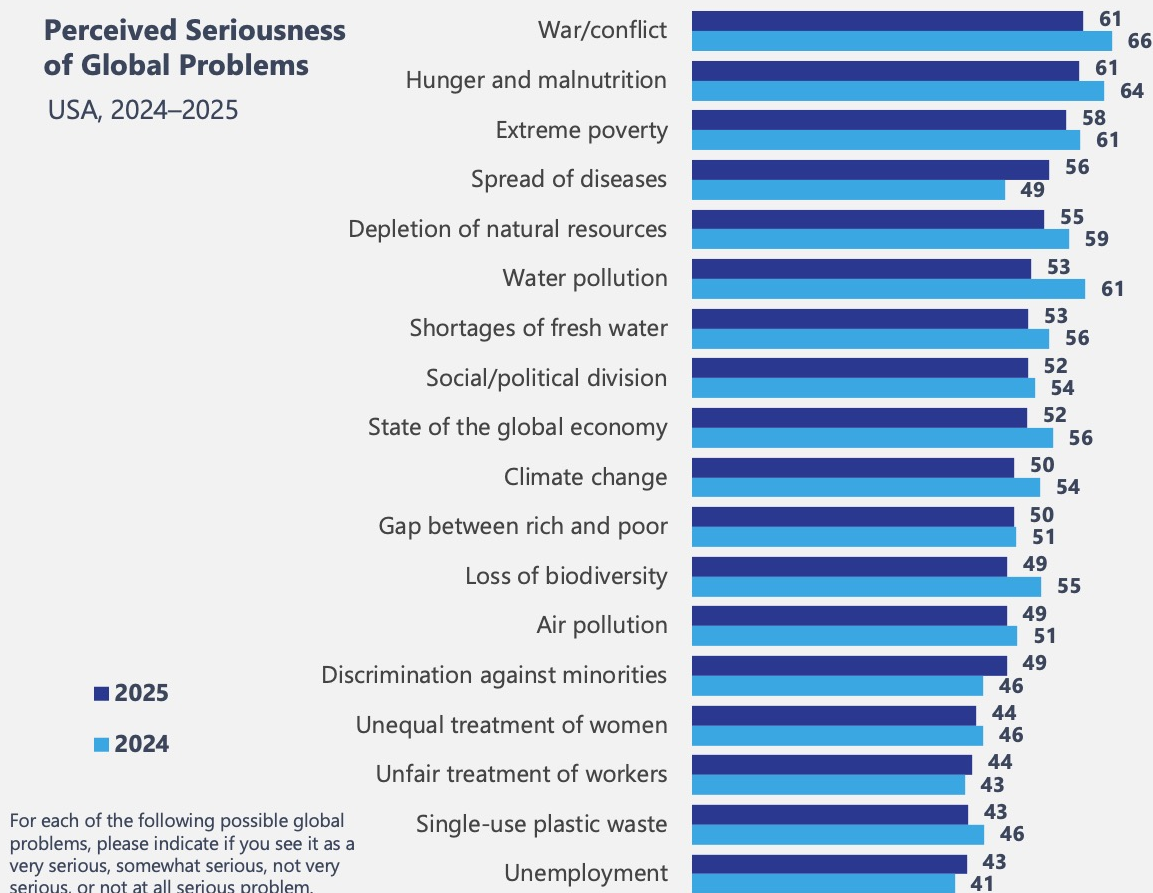
Each year, we survey individuals in the United States and around the world to gauge perceptions of the severity of global challenges. The prioritization of these challenges reflects societal values.

Although we see a slight softening in how seriously Americans perceive key societal challenges, the overall pattern of concern remains resilient and consistent with last year.

Our findings show mostly minimal changes across environmental and socio-economic issues, except for the spread of human diseases which has increased by 7 points since July 2024, and water pollution and biodiversity loss which have decreased by 8 points and 6 points, respectively, since July 2024.

Perceived Seriousness of Global Problems

USA, 2024–2025

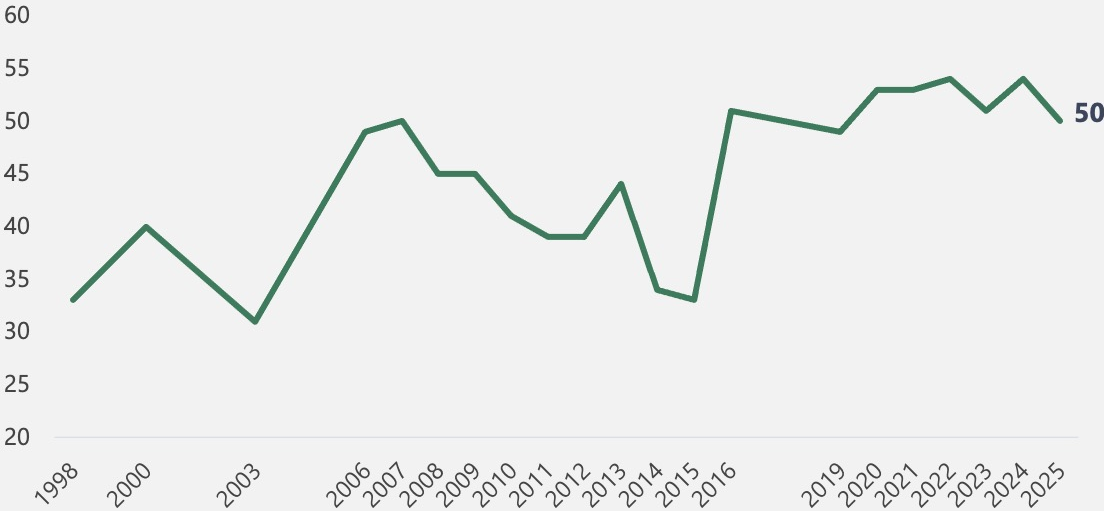


Half of Americans Continue to Consider Climate Change as “Very Serious”

From a long-term tracking perspective, concern about climate change remains at historic highs in the USA. Despite the current political climate and economic challenges, Americans’ concern about climate change has only declined very slightly compared to seven months ago, and half of Americans still consider climate change to be “very serious.”

Those who have become less concerned about climate change are mainly Millennials and Baby Boomers and older. Women have also become slightly less likely in the past seven months to say that climate change is “very serious,” although American women remain more worried about the issue than American men.

Perceived Seriousness of Climate Change
 “Very Serious,” USA, 1998–2025*



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

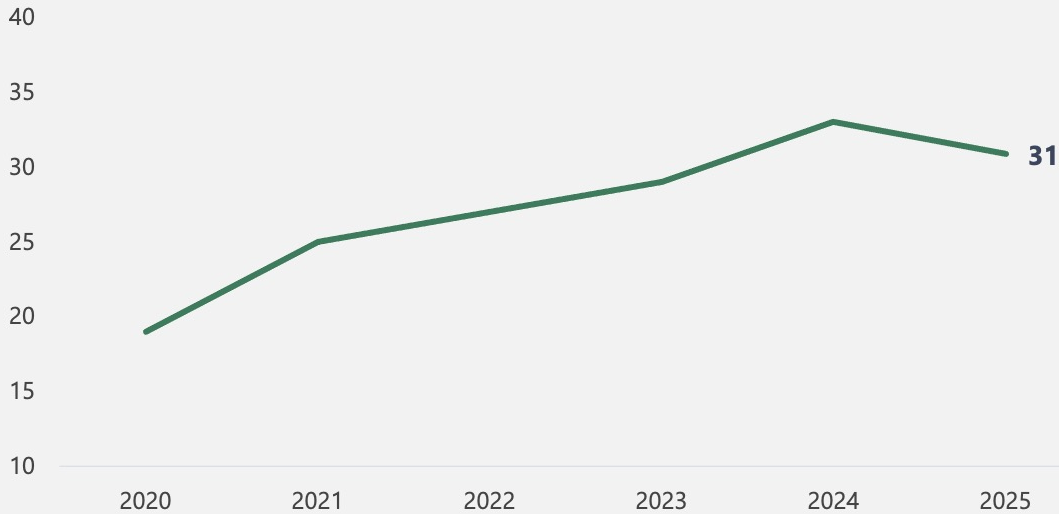
For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem. – Climate change or global warming

Americans Continue to Feel Personally Impacted by Climate Change

The proportion of Americans who say they feel personally impacted by climate change has been consistently increasing since the metric was first tracked in 2020. Thirty-one percent of respondents in the USA now say they are greatly affected, an increase of 12 percentage points since 2020.

The proportion who feel directly affected by climate change has only decreased very slightly (within the margin of error) compared to July 2024, suggesting Americans continue to feel equally affected as they did seven months ago.

Extent Personally Affected by Climate Change
"Greatly Affected," USA, 2020–2025



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

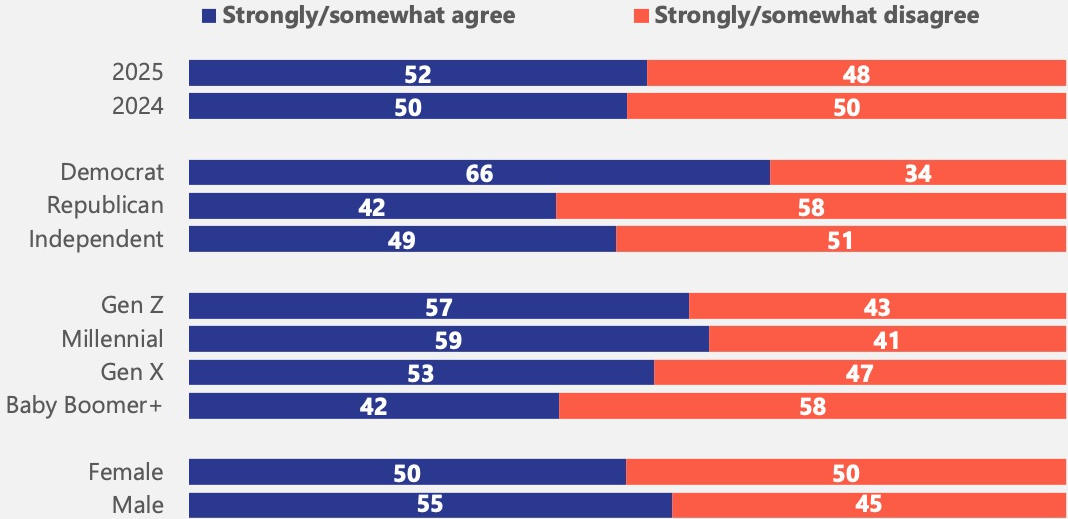
Americans Remain Split on Paying More Tax to Limit Climate Change

Americans’ willingness to pay more in taxes and higher prices to limit climate change has also remained remarkably steady despite the political context changing dramatically between July 2024 and March 2025.

Political affiliation significantly influences opinions, with Democrats showing the most willingness to pay more while Republicans are less inclined. Independents fall in between, with nearly half agreeing.

Generational differences also play a role, with Millennials and Gen Z leading in willingness to pay more to limit climate change and Baby Boomers and older being the least willing. Men are more willing to pay more than women.

Willingness to Pay More in Taxes and Higher Prices to Limit Climate Change
USA, 2024–2025



For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. – I would be willing to pay more in taxes and higher prices if this would help to limit climate change.



2.

AMERICANS WANT COMPANIES TO LEAD RESPONSIBLY

There is a strong signal-to-noise problem in today's political environment. Many may have assumed that the ferocity with which the Trump administration has attacked DEI has some basis in popular support. This quantitative research shows that the American public is instead highly supportive of companies speaking out on a number of sustainability and social issues.

Companies with the savvy and conviction to meet consumer expectations can be more vocal around these issues and potentially improve brand trust.

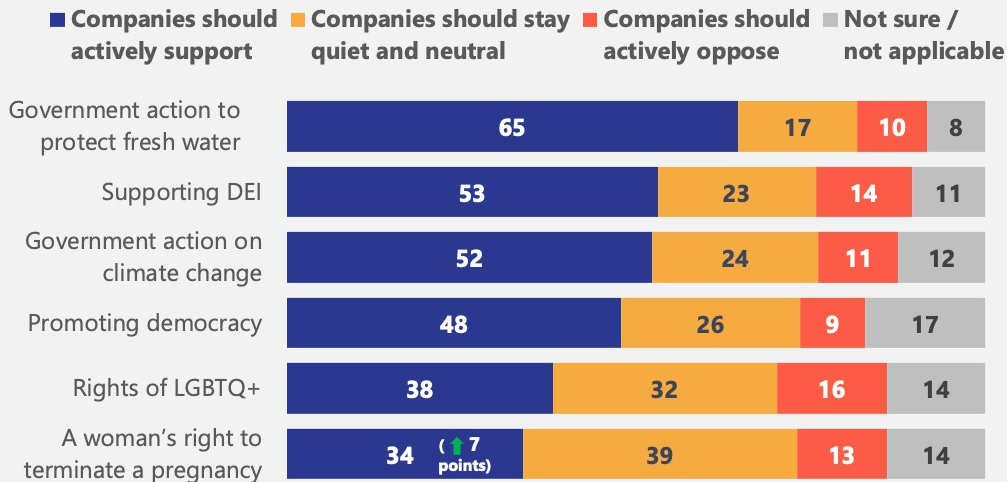
American Public Bullish on Companies Speaking Out and Actively Supporting a Range of Environmental and Social Issues

Regarding the backlash against the sustainability agenda and diversity, equity, and inclusion (DEI), our March survey reveals that a majority of Americans (53%) want companies to actively support DEI, while only 14 percent want companies to actively oppose it.

Notably, even among Republican voters, there is considerable support for companies to advocate for DEI, with 38 percent in favor and 19 percent opposed. This indicates a relatively robust endorsement of DEI initiatives across the political spectrum.

Expectations for Corporate Advocacy

USA, 2024–2025



Do you think companies should speak out and take sides on the following issues?

Expectations for Corporate Advocacy Remain Steady across Most Issues

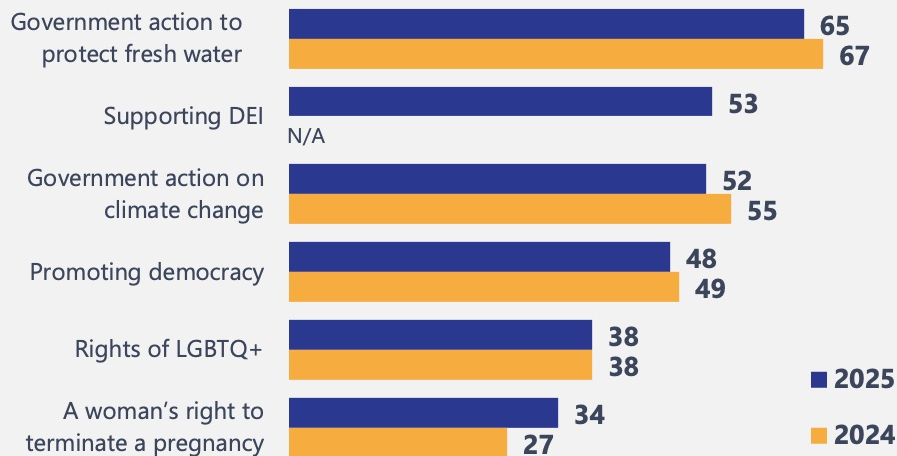
Overall, support for corporate advocacy has not significantly declined.

American consumers exhibit stable levels of backing for corporate advocacy on government actions to protect the environment, advance democracy, and support LGBTQ+ rights.

Notably, there has been a marked increase in the number of Americans endorsing corporate advocacy for women's reproductive rights.

Expectations for Corporate Advocacy

Companies Should Actively Support, USA, 2024–2025



Do you think companies should speak out and take sides on the following issues?

CEOs Are Expected to Speak Out to Defend Climate Action and DEI Initiatives

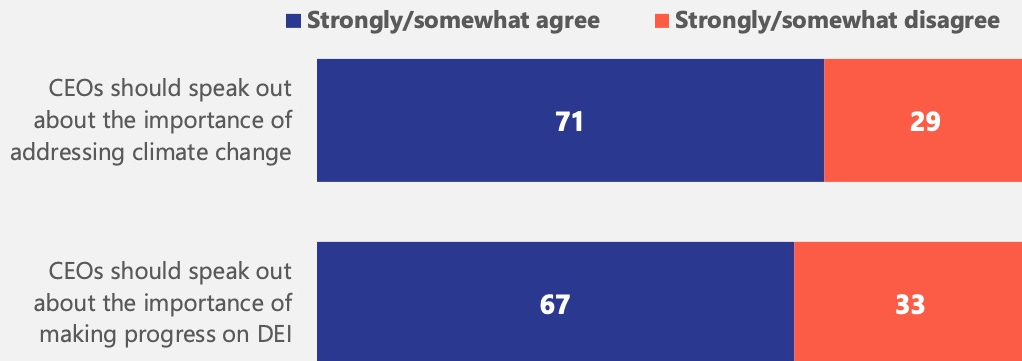
Americans' support for companies to be more vocal on sustainability is also reflected in their responses to a question we asked for the first time in this March survey:

71 percent of Americans agree that CEOs should speak out about the importance of climate change, and 67 percent agree that CEOs should speak out about the importance of DEI.

Majorities of Americans of all demographics say CEOs should speak out about climate change, including 56 percent of Republicans. Democrats (83%) and Gen Z (78%) are most likely to want CEOs to defend DEI, but half of Republicans (50%) and a slim majority of Baby Boomers and older (56%) also agree.

CEOs Should Speak Out about the Importance of Addressing Climate Change and Making Progress on DEI

USA, 2025



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

Trust in Science/Academic Institutions and Government Is Down, while Trust in Business and Fellow Citizens Is Up

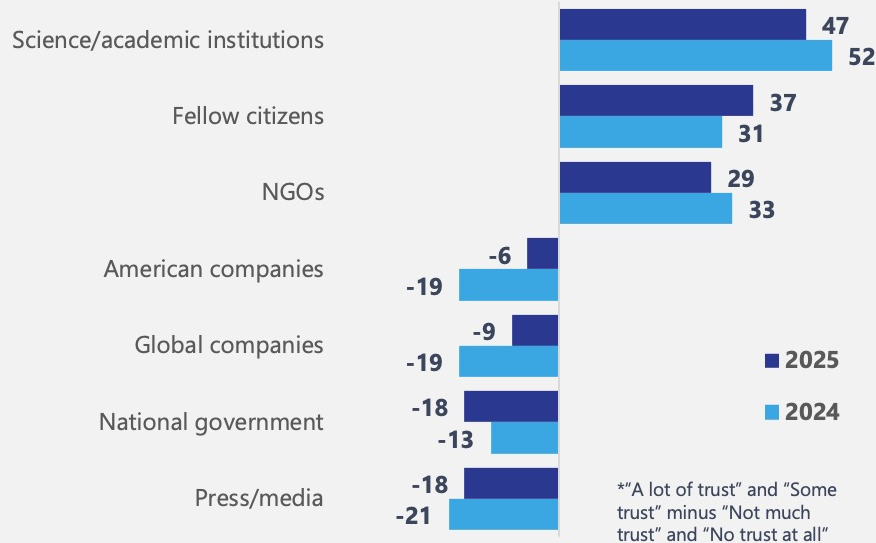
The American public's trust in business is still in the red, but the tide may be turning: net trust has increased since 2024, suggesting early signs of renewed confidence in difficult times.

In tracking Thick Trust, i.e., how much people trust different institutions to operate in the best interest of society, business has become more trusted among Americans compared to July 2024, with a 10-percentage-point increase in net trust for global companies and a 13-percentage-point increase in net trust for American companies.

In contrast, Thick Trust in national government and scientific/academic institutions has declined by 5 percentage points each.

Trust in Institutions

Net Trust,* 2024–2025



Please indicate how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?



3.

A LARGE OPPORTUNITY REMAINS FOR THE SUSTAINABILITY-DRIVEN MARKETPLACE

Despite the shifting political context, Americans are now more likely to be shopping with their values and choosing sustainable products.

Demand-driven action is a key part of the business case for sustainability, and the fact that it is increasing suggests consumers may find the marketplace to be a satisfying arena to express their values *vis-à-vis* sustainability.

There Is a Robust Market for Sustainable Products in the USA and It Could Be Growing

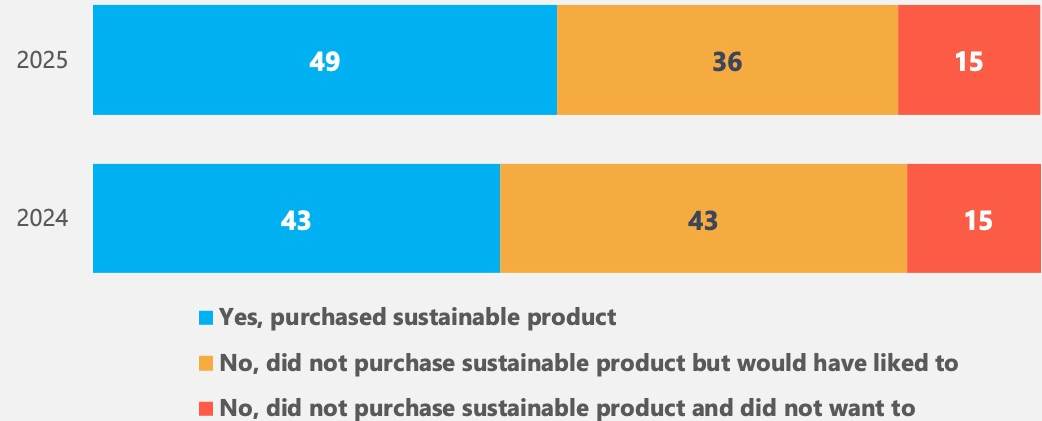
American consumers are now more likely than they were last summer to say they recently purchased a sustainable product:

49 percent report buying an environmentally friendly product in the last month compared to 43 percent in July 2024.

Another one-third of Americans (36%) also indicate that they would have liked to have purchased an environmentally friendly product but were unable to do so. Only 15 percent of the population is uninterested in sustainable purchases, reinforcing the fact that there are significant opportunities for brands when it comes to consumer demand for sustainable products and services.

Environmentally Friendly Product Purchase in Last Month

USA, 2024–2025



Have you bought an environmentally friendly product in the past month?

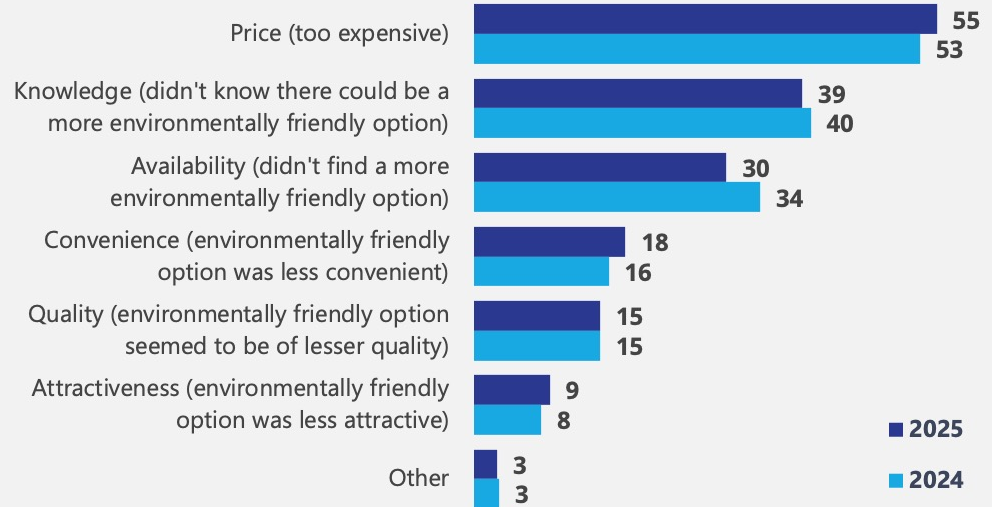
Would you have liked to buy a product that was environmentally responsible, if you could have?

Price Remains the Leading Barrier for American Consumers Who Want to Buy Sustainable Products but Did Not Do So

The ongoing cost-of-living crisis continues to limit access to products that align with people's values, highlighting the affordability gap in sustainable consumption.

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, USA, 2024–2025



Why were you not able to buy any product that was environmentally responsible in the past month even though you would have liked to? Please choose all that apply.

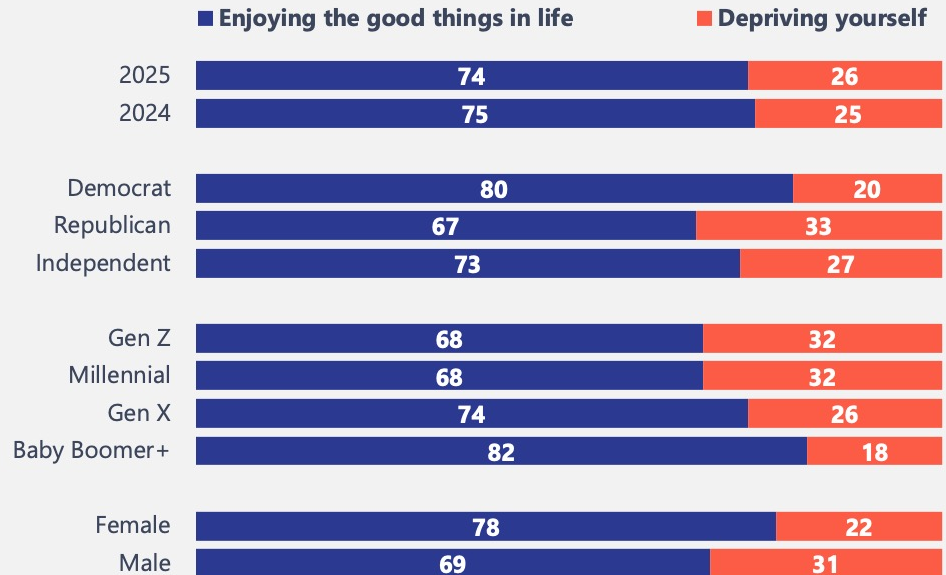
Sustainable Lifestyles Are Not Losing Their Appeal

Americans continue to feel that sustainable lifestyles are enjoyable, and enabling these lifestyles still presents great opportunities for brands and businesses if framed and targeted effectively.

While there are some demographic differences among the American public, enthusiasm for environmentally responsible lifestyles goes beyond partisan or generational divides and provides an opportunity to bring Americans together over shared values while also increasing margins and market share.

Living a Sustainable Lifestyle Means...

USA, 2024–2025



Which of the following is closest to your opinion?

Implications

1.

Stay the course

Americans' core values around environmental and social issues remain remarkably resilient, even amid political and economic uncertainty.



Ensure your organization stays focused on the issues your consumers care most about or risk losing relevance and trust.

2.

Lead responsibly

Despite the political noise, Americans expect businesses and their leaders to take a stand on key social and environmental issues.



Lead with savvy, courage, and clarity. Authentic corporate advocacy builds trust and strengthens consumer alignment.

3.

Seize marketplace opportunities

Consumer demand for sustainable products is holding steady, though price remains a key barrier.



Empower your customers to act on their values and stand out from competitors by offering accessible, meaningful solutions.

How GlobeScan Can Support

GlobeScan combines advanced social science methodologies with strategic advisory expertise to help organizations navigate their rapidly changing context.

Reach out to learn how we can help your organization craft evidence-led strategies: insight@globescan.com



Know your world.
Lead the future.

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.

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.

Our purpose is to co-create a sustainable and equitable future.

Learn more: www.globescan.com