FROM CONCERN TO WELL-BEING

The Evolution of the Sustainable Marketplace

HEALTHY & SUSTAINABLE LIVING GLOBAL HIGHLIGHTS 2025

Healthy & Sustainable Living

GlobeScan

Introduction

Effectively engaging consumers on sustainability is an ongoing challenge for brands, NGOs, and governments. Yet empowering consumers to live healthier and more sustainably remains a critical part of the transition to sustainable development and continues to offer significant rewards to those organizations that can facilitate sustainable living.

GlobeScan's 2025 *Healthy & Sustainable Living* research shows that people around the world are less concerned about and engaged with sustainability than in past years. This is especially true for Gen Z, where we find high levels of disengagement from sustainable attitudes and behaviors. Potential reasons for lower levels of environmental concern range from acceptance of climate risk as a permanent condition and feelings of being powerless or too exhausted to act, to widespread economic and geopolitical insecurity, as well as reduced brand engagement and communications.

This year's research also provides more hopeful insights, including increases in self-reported purchasing of sustainable products and evidence that a new narrative of sustainability as a smarter and healthier way of living could be a catalyst for re-engaging consumers.

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 conducted in partnership with a group of dedicated partners, including Akatú Institute, BBMG, Consumers International, IKEA, Levi Strauss & Co., Mastercard, Mondelez International, NYU Stern Center for Sustainable Business, P&G, Danone, L'Oreal Group, University College London, Target, and WWF International.

Methodology

This year's study is based on 31,960 interviews conducted across 33 markets through representative online samples.

Approximately 1,000 respondents were surveyed in each market, with smaller samples of 500 in Hong Kong, Kenya, Nigeria, and Singapore, and a larger sample of 1,500 in the USA. All samples were weighted to align as much as possible with general population census data.

The surveys were carried out during July and August 2025.

Participating Markets

2025

Key Insights

1. Greenhushing Is Affecting Consumer Engagement on Sustainability

Brands are reducing their sustainability communications due to concerns about backlash and regulatory risk, a trend often referred to as "greenhushing." As a result, public awareness and trust in sustainability messages are declining. Fewer consumers see or believe these messages, weakening their influence on purchase decisions and the adoption of sustainable lifestyles.

2. Despite the Decline in Sustainability Communications, Consumers Are Buying More Green Products

Nevertheless, self-reported sustainable purchasing continues to increase even as worries about environmental issues and climate change soften and sustainability messaging loses traction. Consumers across many mature markets have also become more likely to say they would pay a premium for sustainable products. This shows that fearful concern is likely not a strong driver for the next phase of growing green purchasing, even if it was important before.

3. Well-being Is the Consumer Unlock for Sustainability

Instead, advanced data modeling shows that people are more motivated to make sustainable choices by personal priorities such as health, financial well-being, and convenience. Sustainability is maturing and becoming more about making meaningful and smart choices that directly benefit consumers. By framing sustainability as a pathway to personal health and well-being, brands, NGOs, and governments can increase engagement and value for people.

1. Greenhushing Is Affecting Consumer Engagement on Sustainability

Consumers Are Disengaging

As companies quietly retreat from talking about sustainability, a phenomenon known as “greenhushing,” consumers are feeling the effects. Across markets, fewer people recall seeing sustainability messages from brands, and even those who do encounter them say that they have less trust in these messages. With companies being more reserved with their sustainability communications, there has been an attendant trend of lower levels of consumer concern about the environment and less empowerment when it comes to sustainability. Muted brand engagement leads to a dampening of enthusiasm among consumers.

This shift is especially seen among younger generations. Gen Z, once seen as natural leaders for sustainable change, now often reports feeling skeptical and disconnected. The constant stream of climate news paired with economic pressures and politicizing of these issues has left many people confused about how their choices fit into the bigger picture. The gap between caring and acting is widening, and unless we find new ways to engage, we risk losing the momentum of an entire generation.

Fading Reach and Trust in Sustainability Communications

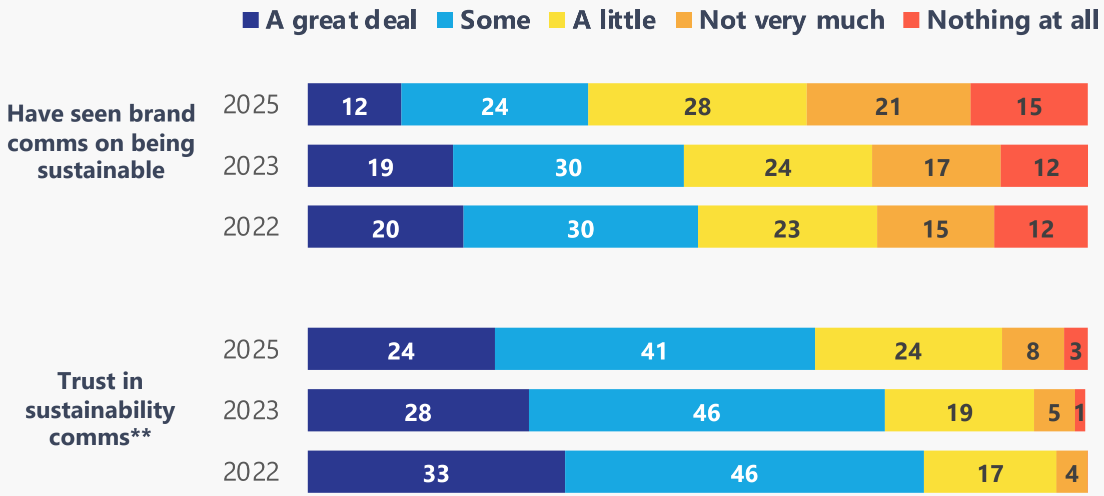
Across nearly all markets, the visibility and credibility of sustainability communications are diminishing. Consumers are now much less likely than they were two years ago to say that they have seen, read, or heard brands marketing or communicating about sustainability, and those who have picked up on those messages are now less likely to trust them.

This erosion of trust is especially pronounced in categories like home furnishings, electronics, and financial services.

As brands are becoming less vocal about sustainability, this also drives a decline in consumers saying that sustainability influences their purchase decisions.

Reach and Trust in Sustainability Communications

Average of Nine Product Categories,* Average of 31 Markets,** (%), 2022–2025



*Includes cars/automobiles, cleaning products, clothing/apparel, electronics, financial services / banking, home furnishings, packaged food/beverages, and personal care products. *For consistent tracking, this chart does not include Morocco and Poland.
**Subsample: Those who have heard "a great deal" and "some" of sustainability communications for each product category.

Sustainability on Its Own Is Becoming Less Influential as a Purchasing Driver

Fewer consumers across all categories now say that sustainability in general is influencing their purchase decisions.

This is a missed opportunity for brands. The data also show that the more consumers are exposed to messaging ("a great deal,") the more they think that this messaging plays a role in their purchasing decisions, showing that there is a clear link.

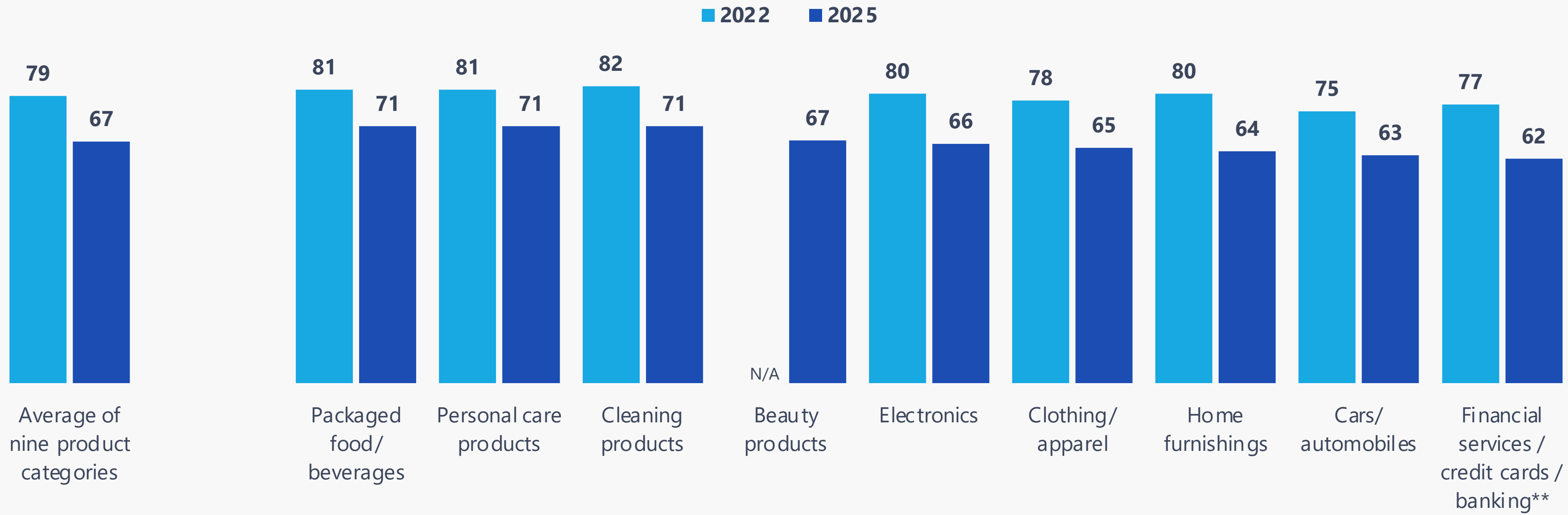
However, there are positive signs of how to sustain interest, and this can be done by helping consumers link sustainability with other benefits.

Packaged food, personal care, and cleaning products show steep drops in sustainability-driven purchases, yet these everyday categories offer brands a chance to reframe messaging and renew relevance.

See full results

Environmental Friendliness Plays a Role in Purchase Decision

Plays "A Great Deal" and "Some" Role, Average of 31 Markets, (%), 2022–2025



Subsample: Those Who Have Heard "A Great Deal" and "Some" of Sustainability Communications for Each Product Type
*For consistent tracking, this chart does not include Morocco and Poland. **In 2022 this was asked as Financial services and banking.

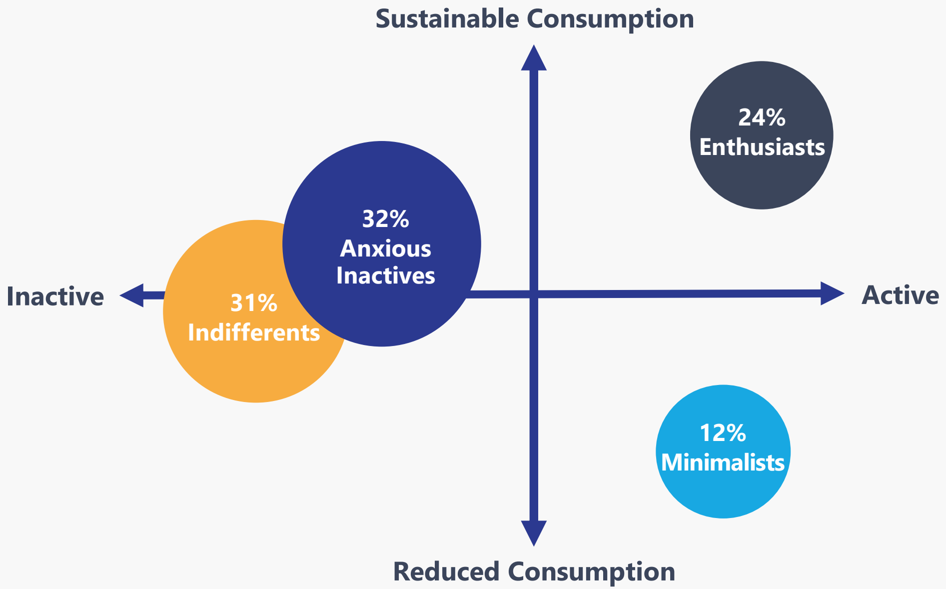
Disengaged Consumer Segments, Especially Gen Z, Now Lead

Across age groups in all 33 markets, consumers can be divided into four attitudinal segments based on their responses to a range of questions about environmental attitudes: Enthusiasts (highly engaged in sustainability and keen to pay more for environmentally responsible products, 26% globally); Minimalists (concerned but less willing to pay more for environmentally responsible products, 20%); Anxious Inactives (who feel guilty but are disengaged, 26%); and Indifferents (the least engaged and the most skeptical, 28%).

The segmentation shows that inactive segments (Indifferents and Anxious Inactives) now outnumber the active segments. This is especially the case for Gen Z, who are the least engaged in sustainable attitudes and behaviors at the global level.

Segmentation Based on Environmental Attitudes

Gen Z, Average of 33 Markets, 2025



2. Despite the Decline in Sustainability Communications, Consumers Are Buying More Green Products

A Decoupling of Environmental Concern and Green Purchasing

Although the research shows that most people remain greatly concerned about climate change and other environmental issues, environmental concern is becoming less pronounced at the same time as engagement by many brands is becoming more muted. For some people, the urgency of climate change and other issues may feel more distant, abstract, or simply overwhelming, and the sense that individual actions matter is fading.

The old model assumed that concern about the planet would drive sustainable purchases. Instead, our research shows that despite softening environmental engagement and less visible sustainability messaging by brands, sustainable purchasing is quietly increasing. This paradox suggests that consumers are not necessarily buying green products just because they are worried about the environment or because of green messaging. There seems to be something else that is now driving green purchasing.

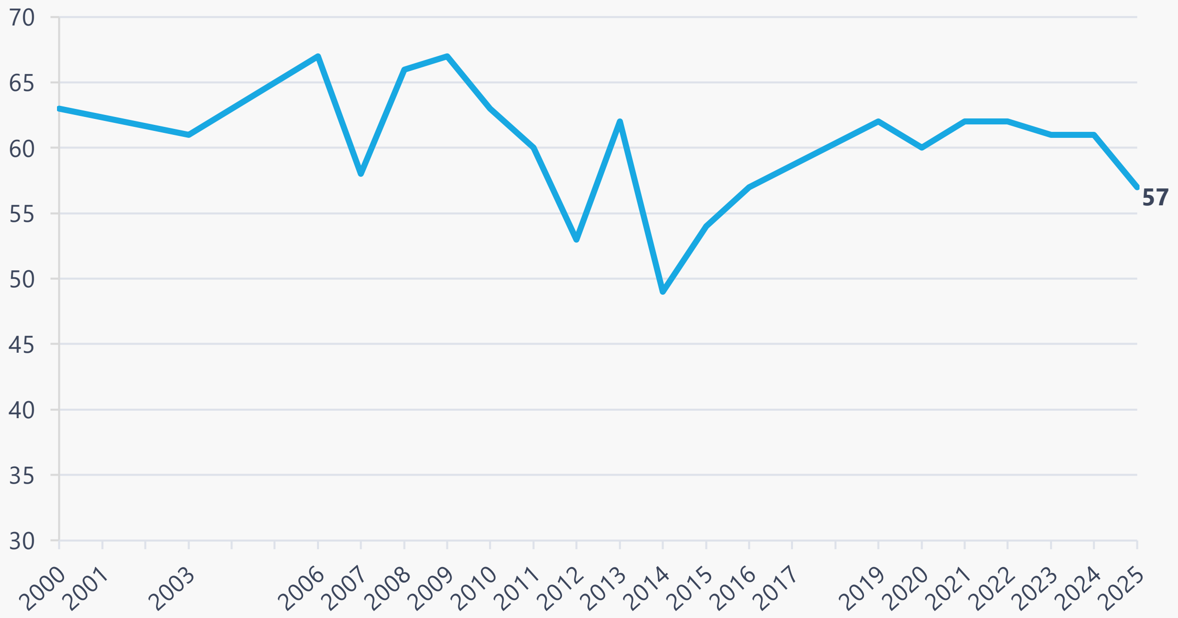
Softening Concern about the Climate and Environmental Issues

Concern about climate change and environmental issues is trending downward globally and has softened year over year across most markets surveyed. However, concern remains comparatively high across parts of Latin America and the Global South.

The waning concern for climate change and environmental issues may be attributed to a mix of fatigue, hyper-normalization (where people are aware but continue to act as if everything is normal because an alternative seems impossible to reach), and the overwhelming complexity of the challenges at hand, but may also be linked to the retreat of brands from promoting sustainability.

Index of Environmental and Climate Change Concern

Average of Six Environmental Issues, Average of 16 Markets,* (%), 2000–2025



*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Spain, Türkiye, UK, and USA. Not all markets were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

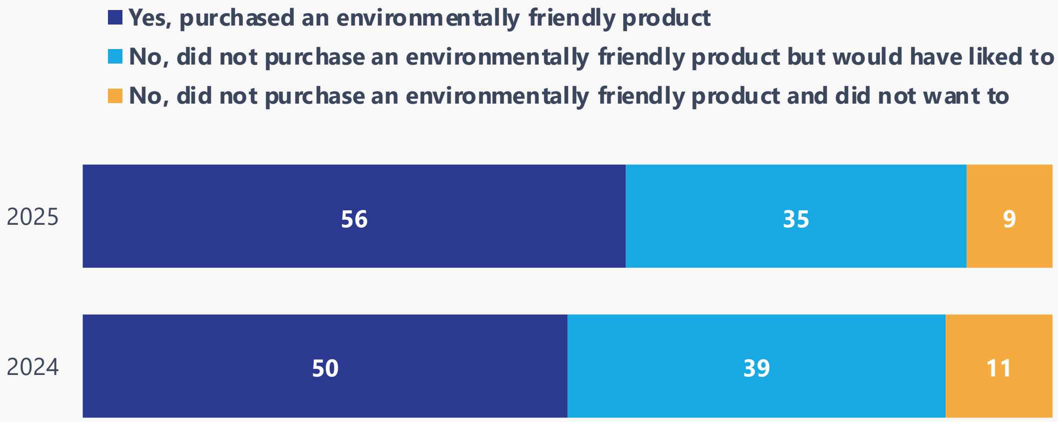
Purchases and Appetite for Green Products Grow despite Falling Concern

However, self-reported green purchasing continues to increase even as environmental concern declines, and sustainability messaging is losing traction. This trend is consistent across all markets tracked except Egypt and Hong Kong.

This suggests that worry about environmental issues is not strongly linked to green purchasing and that consumers may be more motivated by other factors.

Environmentally Friendly Product Purchase in the Last Month

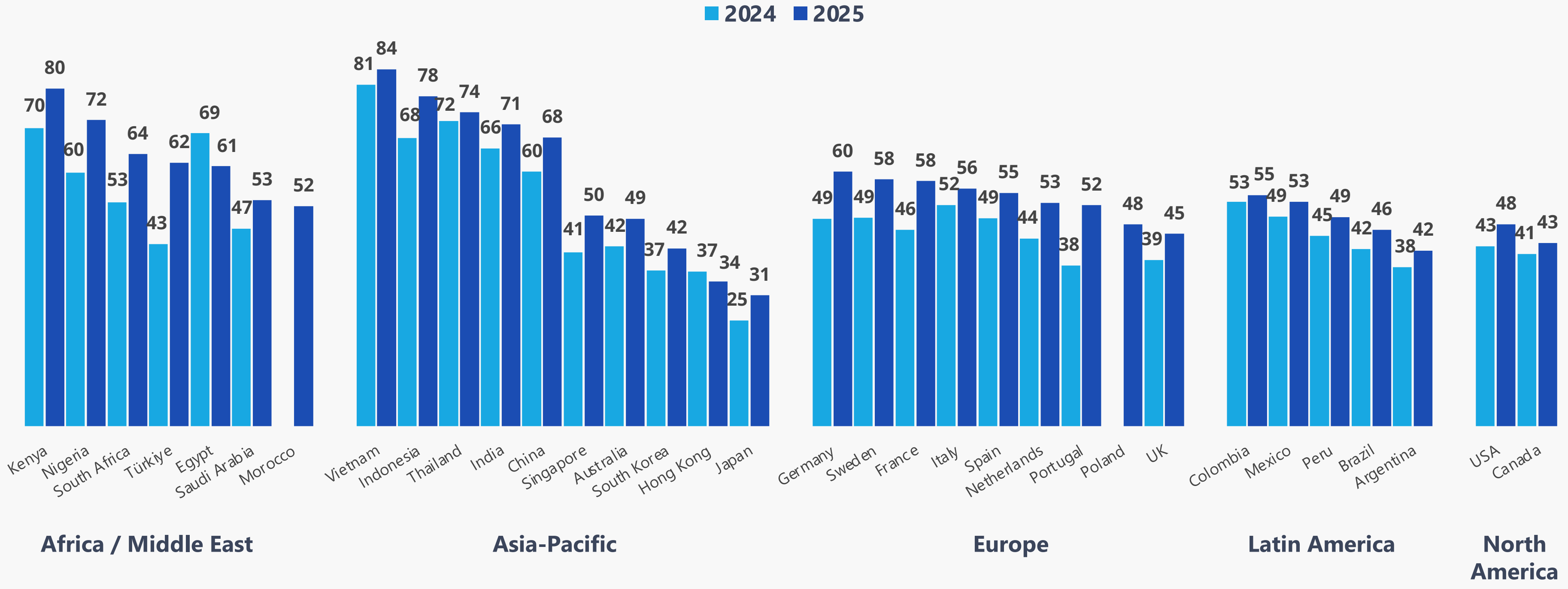
Average of 31 Markets (%), 2024–2025



For consistent tracking, this chart does not include Morocco and Poland as these markets were added to the research is 2025.

Have Purchased Environmentally Friendly Product in the Last Month

"Yes," by Market (%), 2024–2025



Consumers Express Increased Willingness to Pay a Premium

In half of all markets surveyed across nearly all regions, consumers also increasingly agree that it is worth paying more for brands that work to improve society and the environment, despite reporting dampened concern and reduced feelings of being directly impacted by climate change and other issues.

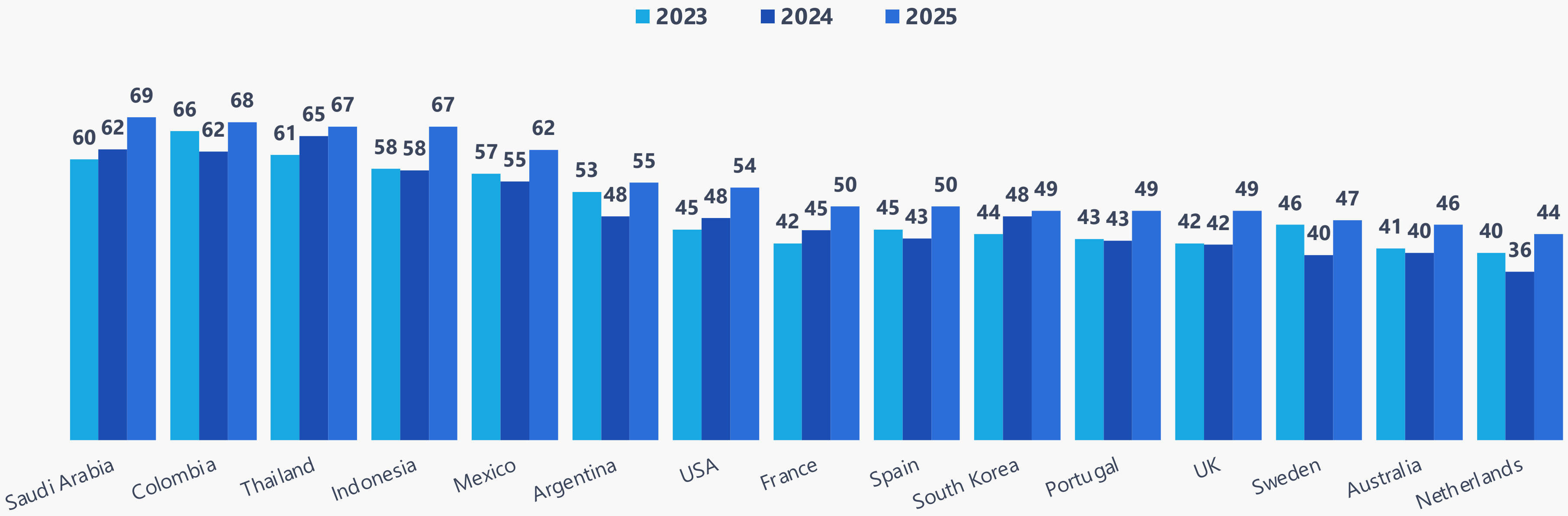
This stated willingness to pay a premium suggests that people are recognizing added benefits of sustainable brands and that these benefits are highly valued.

Stated willingness to pay more for sustainable products/brands has increased by 6 percentage points in the USA since 2023.

See full results

I Am Willing to Pay More for Sustainable Products/Brands

"Strongly/Somewhat Agree," Increases, by Market (%), 2023–2025



3. Well-being Is the Consumer Unlock for Sustainability

Reframing Sustainability around Personal Benefits

This year's study shows that people are not necessarily changing their behaviors due to environmental concern. Instead, they are making changes for tangible benefits like health and cost savings. Behavioral science confirms that immediate, personal advantages motivate action far more than distant collective outcomes. In times of uncertainty, people seek simplicity and reassurance, focusing on what helps their families in the near term.

This suggests a new sustainability narrative is possible, particularly one that is grounded in personal benefit. Rather than asking people to act or sacrifice out of general concern, it is about showing that sustainable choices are meaningful and offer immediate, practical benefits. The opportunity lies in reframing sustainability so it scales to all consumers, not just a niche, highly concerned audience.

Circular business models may offer a way forward for consumers seeking meaningful and smart solutions, with young people especially open to new ways to consume.

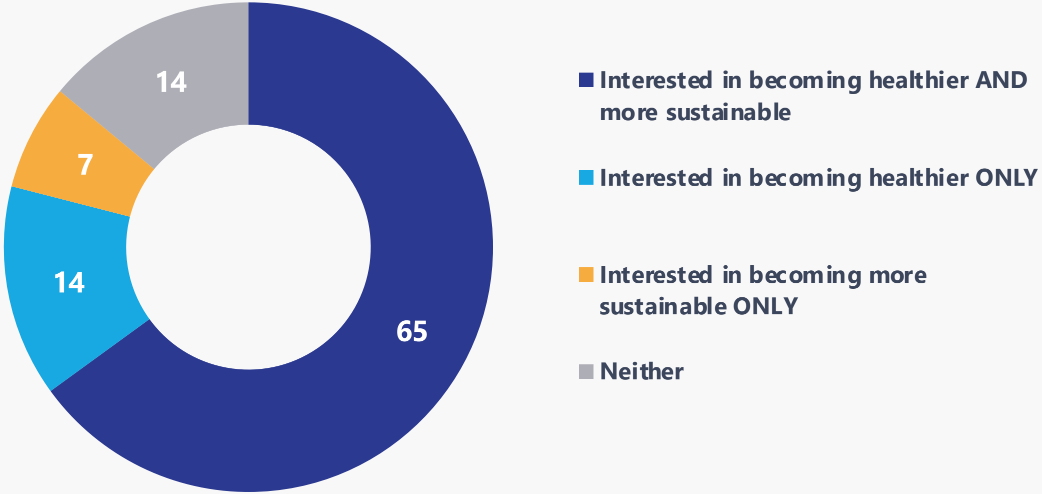
Health and Sustainability Are Strongly Linked

Post-pandemic, there has been a recalibration around self-care and well-being, and this has implications for sustainability: 65 percent of consumers worldwide are interested in *both* the environment and healthy lifestyle changes, making the health and sustainability agendas highly connected in consumers' minds.

Only 7 percent say they want to be more environmentally friendly, but not healthier.

Desire to Change Lifestyle to Be Healthier AND More Sustainable

Desire to Change, Average of 33 Markets, (%), 2025



Health Benefits Drive Sustainability Behavior Change, Not Concern

Structural Equation Modeling (SEM) is a statistical method used by GlobeScan to understand complex cause-and-effect relationships between outcomes and influencing factors. SEM shows that concern is not a substantial driver for sustainable behavior change. Instead, linking sustainability with health is the principal driver of citizen and consumer actions.

The modeling shows that feeling personal responsibility when it comes to improving the environment also matters, but it works best as a starting point and when paired with knowledge and agency. People who feel accountable and knowledgeable are more open to recognizing these benefits and acting on them. However, the statistical analysis shows that there is no strong link between simply feeling concerned and behaving more sustainably. Concern alone does not drive change. It needs to be paired with tangible, personal advantages.

To encourage sustainable behaviors, SEM suggests that communications should focus on immediate personal benefits, showing how sustainable living makes life better right now, and not just for the planet, but for individuals and families.

The Pathway to Sustainable Lifestyle Changes

Structured Equation Modeling (SEM), Average of 33 Markets, 2025

Messaging for Re-engagement

TURF analysis* also emphasizes the importance of highlighting personal agency and the personal benefits of sustainable living in communications, suggesting a path to re-engagement.

The key to reconnecting with consumers lies in emphasizing the agency that people have to make a difference by showing the real-world impact of small individual choices, and then also making these choices rewarding, practical, and affordable while remaining grounded in evidence-based facts and data.

Again, results show that consumers are most inspired when sustainability is positioned as a smart choice that delivers tangible impact and value to their everyday lives.

Optimal Messaging Combination to Inspire Sustainable Behaviors

TURF Analysis, Cumulative Appeal per Message Combination,* Average of 33 Markets, 2025

Single best message (33% appeal)	**Best two-message combination (54% appeal)**	**Best three-message combination (68% appeal)**	**Best four-message combination (77% appeal)**	**Best five-message combination (82% appeal)**
The **positive impact** my choices can have on the environment	The **positive impact** my choices can have on the environment	The **positive impact** my choices can have on the environment	The **positive impact** my choices can have on the environment	The **positive impact** my choices can have on the environment
	Offer **rewards, discounts**, or **recognition**	Offer **rewards, discounts**, or **recognition**	Offer **rewards, discounts**, or **recognition**	Offer **rewards, discounts**, or **recognition**
		Make choices feel **simple** and **achievable**	Make choices feel **simple** and **achievable**	Make choices feel **simple** and **achievable**
			Clear, **evidence-based facts** and **data**	Clear, **evidence-based facts** and **data**
				Affordability or **long-term cost savings**

*Total Unduplicated Reach and Frequency, a technique used to determine the optimal combination of messages that will reach the largest possible audience with minimal overlap

A Way Forward Enabled by Circular Models

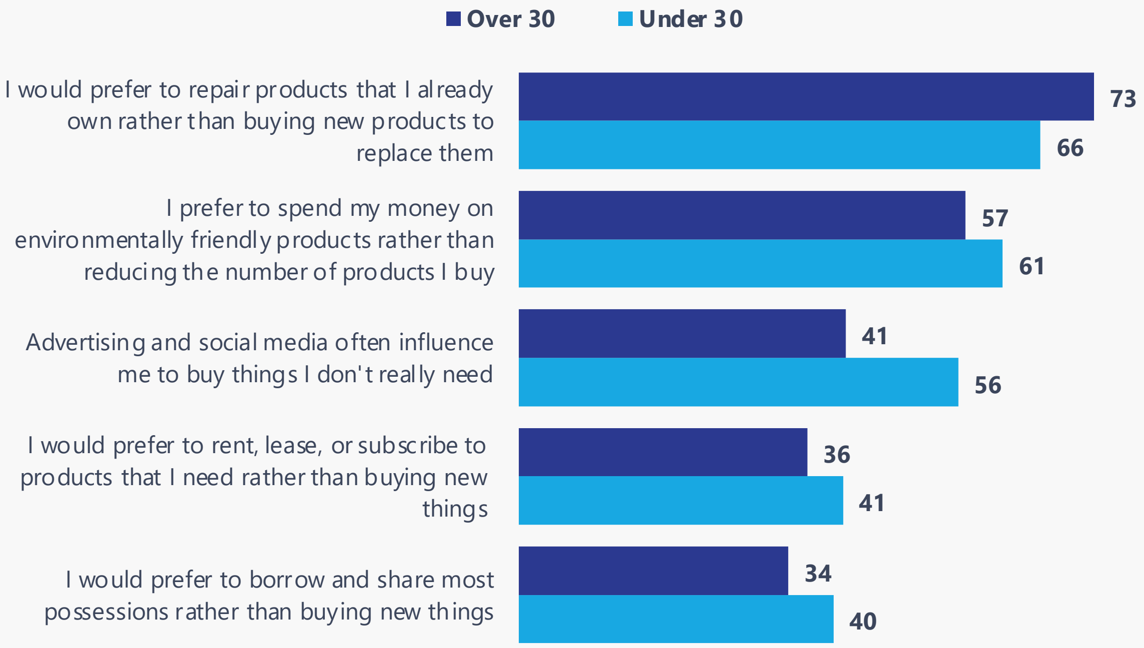
Finally, circular business models may offer a way forward that caters to emerging consumers looking for both meaningful and smart solutions.

Emerging circular models such as product-as-a-service, resale platforms, and repair ecosystems are often especially interesting to younger consumers. Many people now see an attractive option that is more affordable and free from the environmental cost of overconsumption.

However, ownership still holds strong appeal. Many consumers prefer to buy green products over reducing purchases altogether. Social media and advertising continue to fuel this desire, making it critical for brands to position circular options as meaningful, smart, and convenient.

Attitudes: The Emerging Consumer

Average of 33 Markets (%), by Age, 2025



A Way Forward

A Way Forward

Make sustainability the meaningful solution, not the overwhelming concern

Environmental concern is no longer the key driver of sustainable purchasing. Scaring people into action and talking about big, distant concepts like climate change may have worked for early adopters. But now with growing financial and political pressures, greenhushing, and rising skepticism, people can be easily overwhelmed.

We need a new approach to drastically increase the reach, appeal, and relevance of sustainability. Sustainable options need to be reframed as meaningful, credible, and practical choices that deliver tangible rewards such as healthier homes, cost savings, greater convenience, and better performance. When sustainable products are benefit-led, people are increasingly willing to pay more. However, given affordability challenges, a sustainability premium without clear personal benefits is harder to justify.

Make sustainability about health and well-being

Health is increasingly at the heart of engaging consumers around sustainability, and this cuts across cultures and generations. People recognize the link between environmentally friendly living and their own well-being, from cleaner air and safer products to better nutrition and less stress.

Framing environmental action as a pathway to personal health makes it more immediate and compelling, turning what once felt like a sacrifice into a tangible gain. A new narrative for sustainability should include health and well-being at its core to capture consumer needs and ambitions.

Elevate circular choices for savvy consumers

The appeal of buying better, buying less, and choosing durable, repairable, and reusable products reflects a broad and growing desire for value and simplicity. These behaviors are not just environmentally sound, but they also offer financial benefits and a sense of agency, making sustainability feel smart and rewarding.

Young people are leading the shift to new models of consumption. They may feel more overwhelmed and uncertain, but they are also more open to new solutions. Meanwhile, older generations focus on the value of repair and reuse, valuing established solutions, but done better.

GlobeScan's Consumer Engagement & Sustainable Living Offerings

GlobeScan's Consumer Engagement & Sustainable Living service offers a suite of solutions designed to help organizations understand, enable, engage, and empower consumers to live healthier, more sustainable lifestyles.

Our offerings combine qualitative and quantitative research, online and offline methods, and advanced analytical tools to deliver the following:

Consumer Attitudes and Behavior Research: Values, motivations, and barriers, including segmentation to reveal who to focus on and how to engage.

Insights for Product and Program Design: Evidence to shape propositions and experiences that enable sustainable choices.

Message and Campaign Testing: Robust testing to ensure clarity, credibility, and effectiveness across markets and segments.

Thought Leadership: Shared insights that elevate the conversation and mobilize partners across the system.

For additional information, contact us:

insight@globescan.com

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.

Learn more: www.globescan.com