

FROM CONCERN TO WELL-BEING

A New Narrative to
Engage Consumers in
Sustainable Living

FEBRUARY 2026

**Healthy &
Sustainable
Living**



**Globe
Scan**

WHO WE ARE



Know your world.
Lead the future.

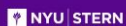
GlobeScan is an insights and advisory firm specializing in trust, sustainability, and engagement.

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.

WHO YOU WILL HEAR FROM TODAY



Randi Kronthal-Sacco
Senior Scholar, NYU Stern CSB



Center for
Sustainable
Business



David Eichberg
Vice President, Sustainability,
Mastercard



Chris Coulter
CEO, GlobeScan



OUR HEALTHY & SUSTAINABLE RESEARCH PROGRAM



- An **annual program launched in 2019** that builds on over 25 years of GlobeScan consumer research in the areas of sustainability, branding, and reputation.
- Samples of approximately 1,000 adults in each of 33 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in USA (n=31,960).
- Samples are **representative of online population**, weighted to reflect general population census data.
- Online surveying in **July and August 2025**.



BBMG



LEVI STRAUSS & CO.



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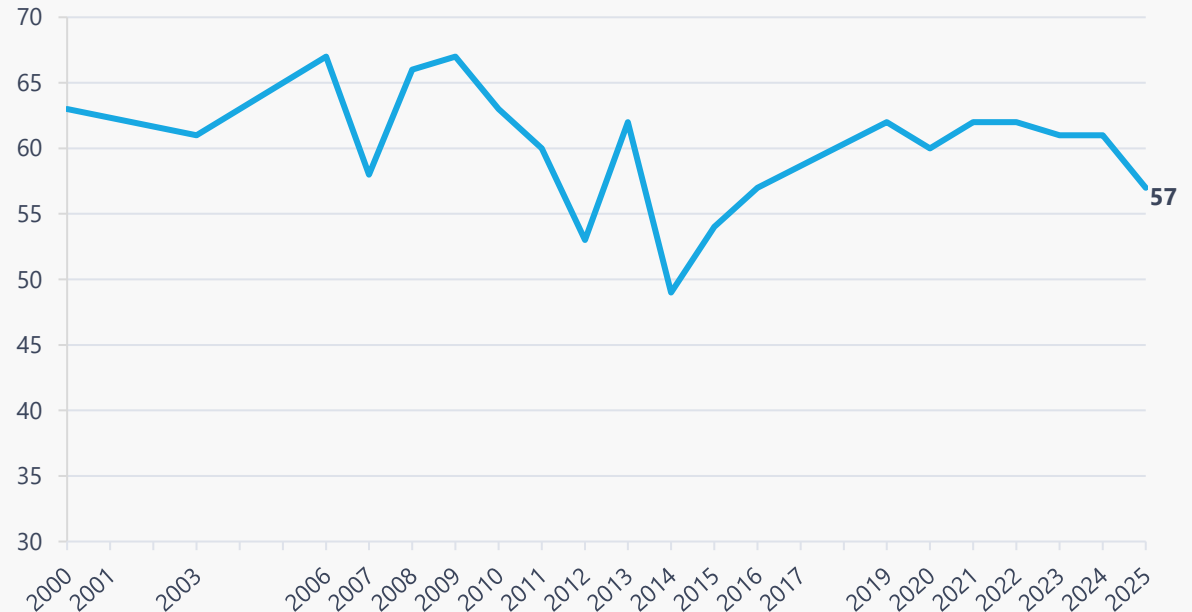
**Concern is down and
behaviours are stuck**



We Are Also Seeing Softening Concern about the Climate and Environmental Issues in General

Index of Environmental and Climate Change Concern

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

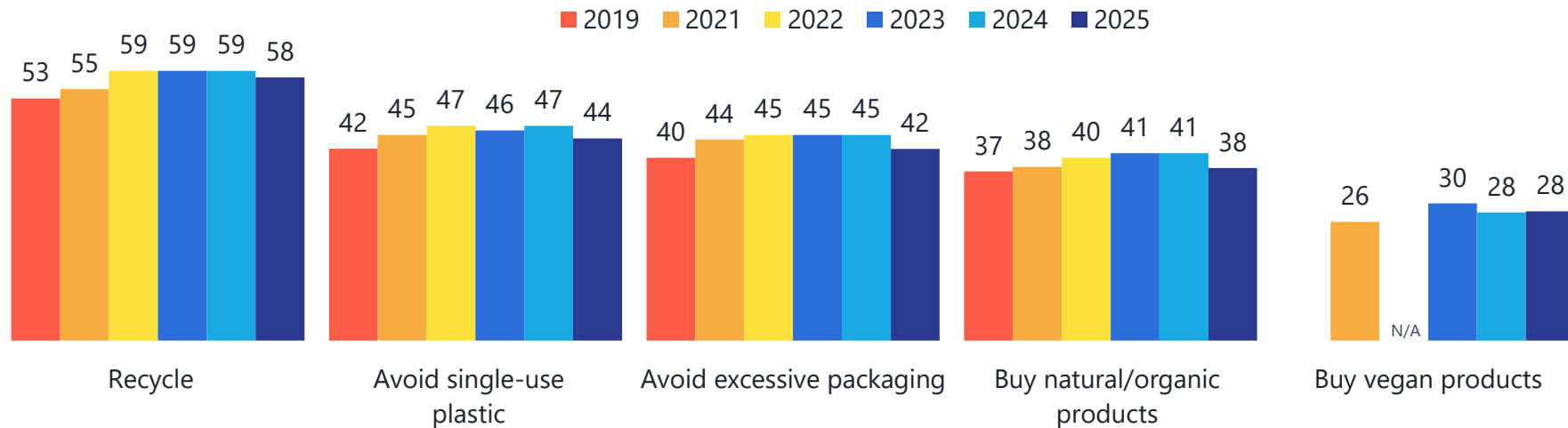


*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Spain, Türkiye, UK, and USA. Not all markets were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

The self-described frequency sustainable behaviors has remained mostly stable over the last few years at the global level

Frequency of Sustainable Behaviors

"Most" and "All of the Time," Average of 23 Markets,* 2019–2025



*For consistent tracking, this chart only includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Türkiye, UK, and USA.

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.

Messaging for Re-engagement – Show How the Sustainable Option Is A Smart, Credible Choice that Makes A Difference

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

2.

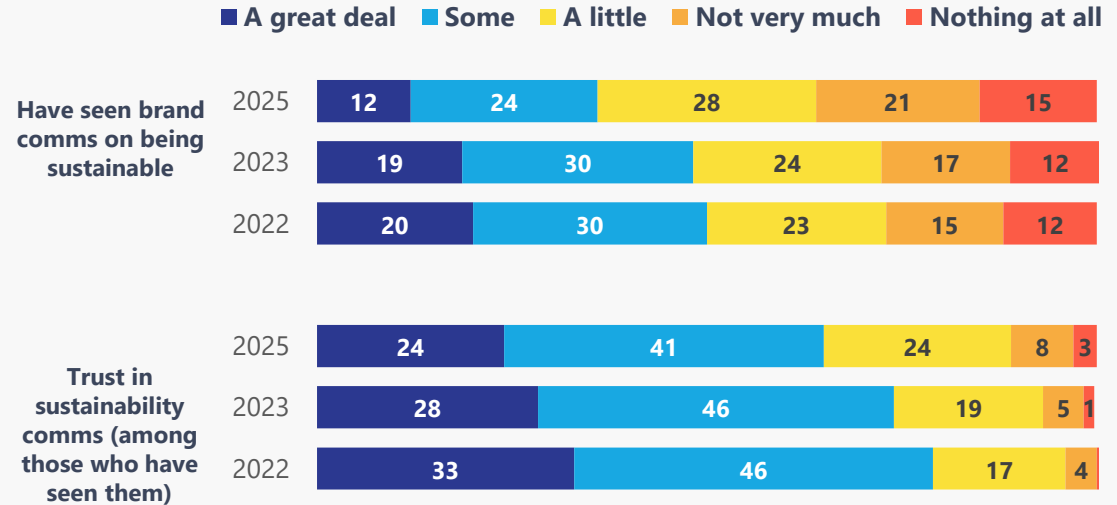
A Decline in Sustainability Communications, Yet Consumers Are Buying More Green Products



Fading Reach and Trust in Sustainability Communications

Reach and Trust in Sustainability Communications

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



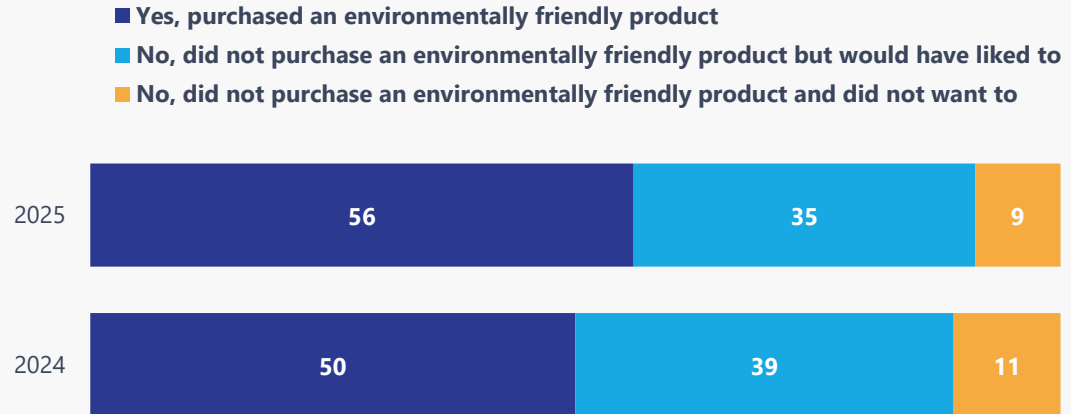
*Includes cars/automobiles, cleaning products, clothing/apparel, electronics, financial services / banking, home furnishings, packaged food/beverages, and personal care products. *For consistent tracking, this chart does not include Morocco and Poland.

**Subsample: Those who have heard "a great deal" and "some" of sustainability communications for each product category.

Purchases and Appetite for Green Products Grow despite Falling Concern

Environmentally Friendly Product Purchase in the Last Month

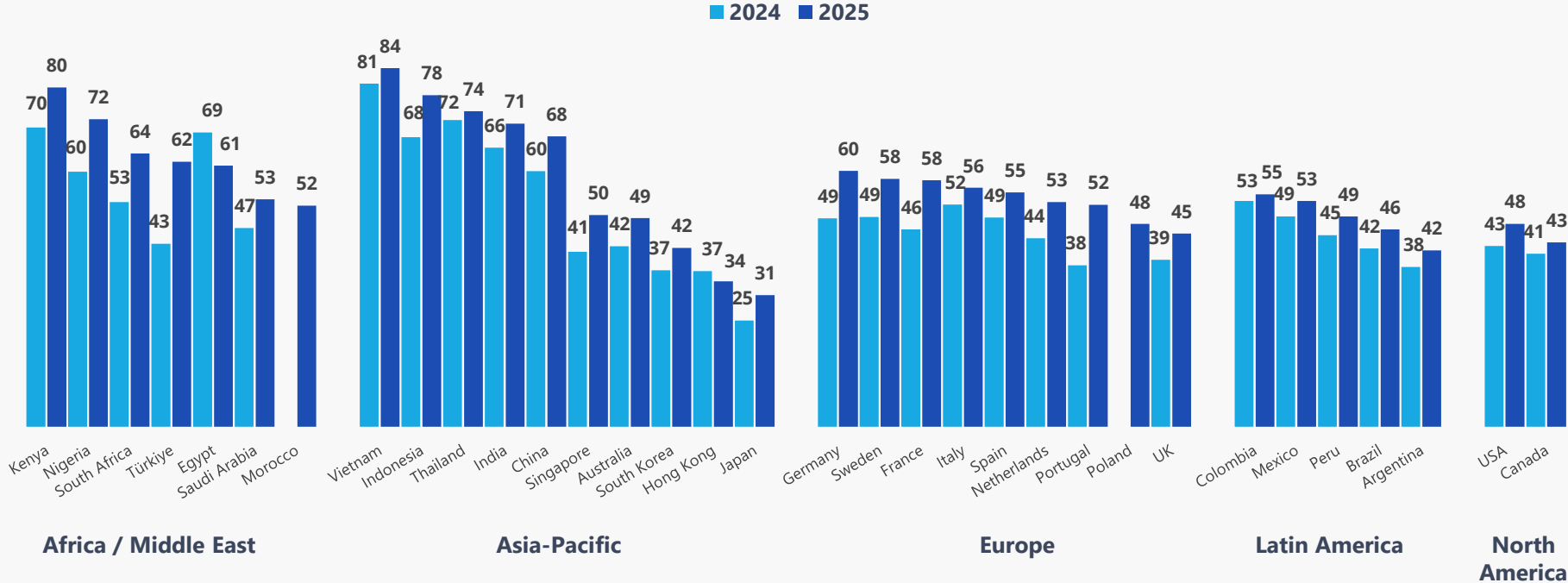
Average of 31 Markets (%), 2024–2025



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

Have Purchased Environmentally Friendly Product in the Last Month

"Yes," by Market (%), 2024–2025



Health and Sustainability Are Strongly Linked in Consumers' Minds

Connecting Sustainability and Health

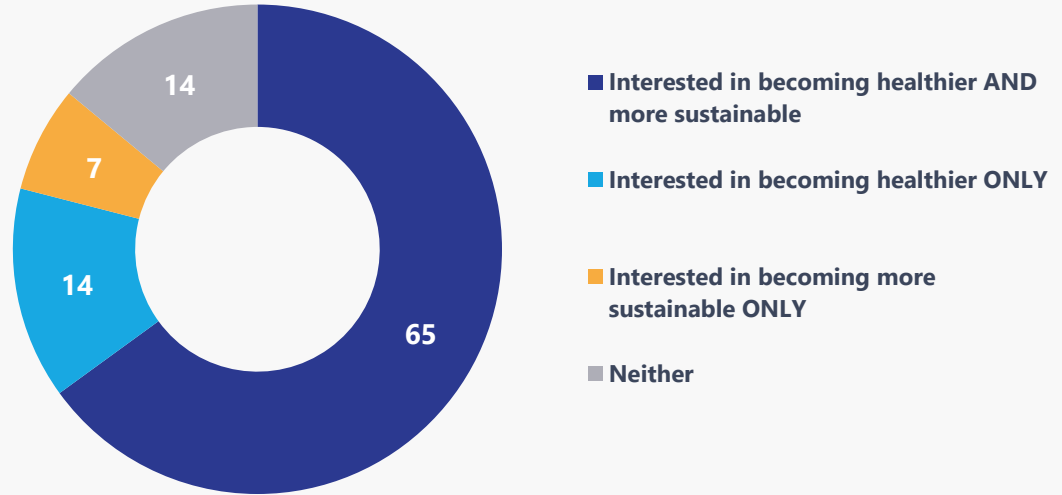
"Strongly" and "Somewhat Agree," Average of 33 Markets, (%), 2025



Most Want to Become BOTH Healthier And More Sustainable

Desire to Change Lifestyle to Be Healthier AND More Sustainable

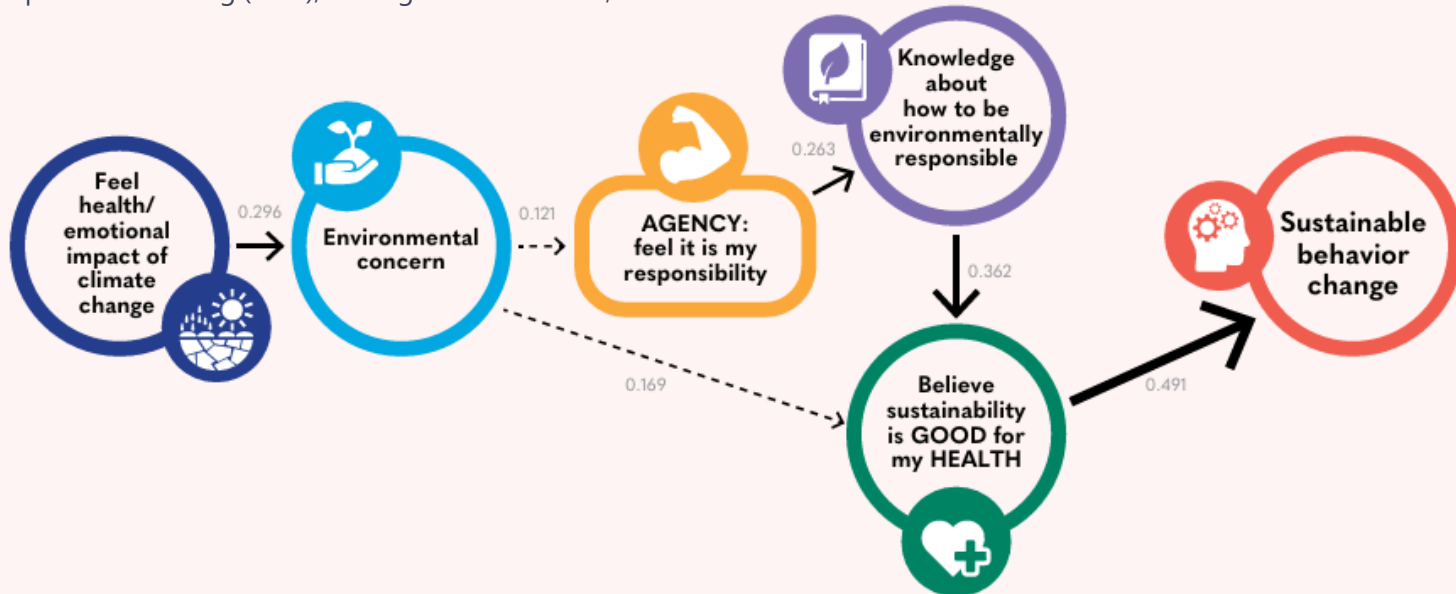
Desire to Change, Average of 33 Markets, (%), 2025



Perceived Personal Benefits Drive Sustainability Behavior Change, Not Concern

The Pathway to Sustainable Lifestyle Changes

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



3.

Sustainability Claims Expand Reach – But Should Be Linked to Personal Benefits



Across the Product Categories Tested, Sustainability Claims Significantly Expand Reach When Combined with Core Claims

- These Must Include Direct Personal Benefits

Messaging Combinations for Optimal Appeal

90% reach

Most Appealing Messages from A Food Brand

Core claim (great taste) + 100% sustainable sourcing, 100% recycled packaging, and good for health, no harmful ingredients

A healthy, sustainable choice that is good for me and family

89% reach

Most Appealing Messages from A Beauty Brand

Core claims (quality, results) + safe and organic ingredients and 100% recycled packaging

A healthy choice that protects me and the planet

91% reach

Most Appealing Messages from A Clothing/Apparel Brand

Core claims (quality, comfort) + 100% sustainable materials and no microplastics to protect oceans, designed to last longer

A smart, sustainable choice that saves me money

89% reach

Most Appealing Messages from A Household Cleaner Brand

Core claim (cleans well) + 100% sustainable, natural/chemical-free ingredients and no microplastics to protect oceans and human health, 100% recycled packaging

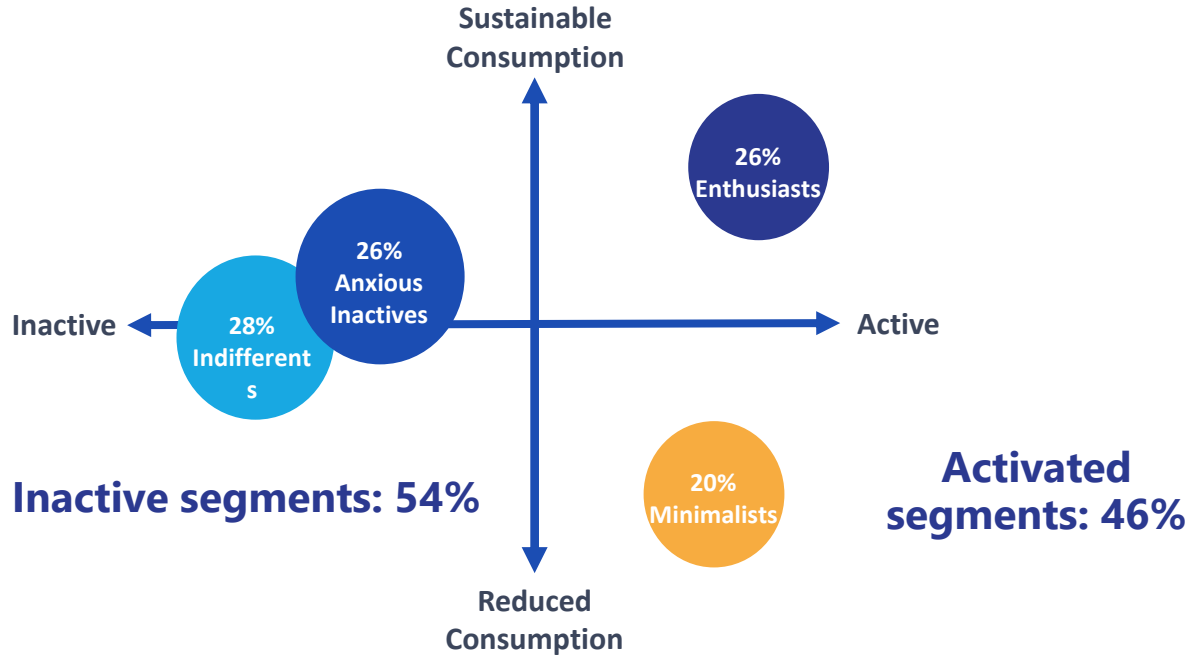
Healthy, sustainable choice that protects my family

*"Reach" or cumulative appeal refers to the percentage of respondents who picked at least one of the claims in the combination as most inspiring.

Segmentation Based on Attitudes

Average of 33 Markets, 2025

For Gen Z, six in ten are either *Anxious Inactives* (32%) or *Indifferents* (31%)



Segmentation based on environmental attitudes shows inactive segments are more prominent than activated segments at the global level

KEY INSIGHTS FOR NAVIGATING 2026

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” and consumers are noticing.



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

Nevertheless, **self-reported sustainable purchasing continues to increase** - that sustainable product purchasing is driven by factors other than just concern about the environment.



3. Well-being and Personal Benefits Is the Consumer Unlock for Sustainability

People are more motivated to **make sustainable choices by personal priorities** such as health and well-being. Sustainability is becoming more about making **meaningful and smart choices** that directly benefit consumers, rather than abstract narratives.

