

# Five Consumer Insights to Activate Healthy and Sustainable Living in Asia-Pacific

APAC highlights from GlobeScan's  
*Healthy & Sustainable Living*  
Global Consumer Research Program

January 2022



**Enabling consumers to live more healthy and sustainable lives is not only crucial for our collective future, but also an enormous opportunity for brands to build more trust, loyalty, and engagement with consumers.**

The *Healthy & Sustainable Living: A Global Consumer Insights Project* was launched in 2019 to help companies better understand, engage, and mobilize consumers in this exciting yet challenging area of consumer engagement in sustainability. The research program builds on 20+ years of GlobeScan’s public opinion research in the areas of sustainability, branding, and reputation, and is designed to help organizations better understand the diverse mindsets of consumers that shape their barriers to, and enablers of, more healthy and sustainable living.

The 2021 study is the largest yet including over 30,000 interviews across 31 markets. It tracks a number of findings over time to understand shifting trends and explores new topics to keep up with the evolving agenda. This report captures key highlights of the Asia-Pacific (APAC) region from 10 markets.

The research was designed with and supported by a set of committed partners: Akatu Institute, CVS Health, IKEA, Levi Strauss & Co., NYU Stern Center for Sustainable Business, PepsiCo, Reckitt, Visa, and WWF International.

**10 surveyed APAC markets:**

- Australia
- Mainland China
- Hong Kong
- India
- Indonesia
- Japan
- Singapore
- South Korea
- Thailand
- Vietnam

**Other surveyed markets:**

- Argentina
- Brazil
- Canada
- Colombia
- France
- Germany
- Italy
- Kenya
- Mexico
- Netherlands
- Nigeria
- Peru
- Portugal
- Russia
- Saudi Arabia
- South Africa
- Spain
- Sweden
- Turkey
- United Kingdom
- United States



# Asia Pacific's consumers will be at the forefront of global consumption growth in the coming decade.

Consumers from APAC are expected to account for half of global consumption growth in the next decade, offering a US\$10 trillion consumption growth opportunity. Meanwhile, they are also more conscious than before of sustainability topics and are finding ways to incorporate sustainable behaviors and habits into their daily lives. Businesses that can capture APAC's sustainable consumption boom will gain a competitive advantage in the market.

Based on GlobeScan's latest *Healthy and Sustainable Living* research program, five key insights on sustainable consumption trends of APAC consumers are highlighted:



There is a wide gap between how much APAC consumers desire a healthy & sustainable lifestyle and their actual behavior.



APAC consumers are expected to spend a larger proportion of their money on brands or products that are socially and environmentally responsible.



A healthy and sustainable lifestyle is still too expensive for APAC consumers despite a greater willingness to pay more for responsible products or brands.



Products that are long-lasting, use fewer resources, and use recycled/ recyclable packaging are the most helpful actions from companies to help support APAC consumers' healthy & sustainable lifestyles.



APAC consumers value companies and brands that are transparent about their products' impact and how they manage their supply chain.

# There is a wide gap between how much APAC consumers desire a healthy & sustainable lifestyle and their actual behavior.

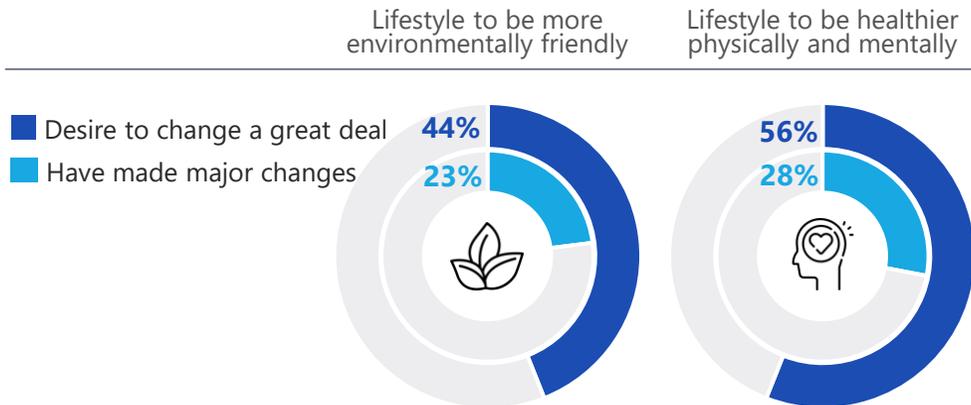
## How do we know?

- There is an aspiration-action gap among APAC consumers when it comes to:
  - *Living in a more environmentally friendly way*: 44% would like to change a great deal vs 23% who say they have made major changes
  - *Living healthier both physically and mentally*: 56% would like to change a great deal vs 28% who say they have made major changes
- Compared to before the pandemic, APAC consumers expect to live in a more eco-friendly (39%) and healthy (61%) way post-pandemic

## So what?

- The growing opportunity to bridge APAC consumers' actions to aspirations is clear, and there is no better time for businesses to double down on sustainable products and services to capture the market potential while activating consumers' sustainable lifestyles.

**East vs West:** While there is a similar aspiration-action gap to live more sustainably and healthily across APAC, Europe and North America, APAC consumers showed higher desire and action to live in an eco- and health-conscious way post-pandemic (39% and 61%) when compared with Europeans (30% and 45%) and North Americans (26% and 41%).

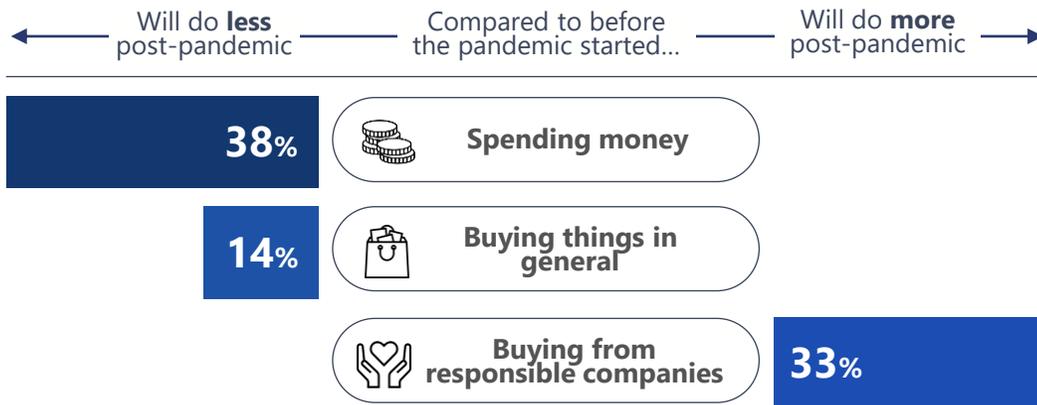


n=6,060, 2021 APAC consumers from 10 countries  
 Question: How much would you like to change your lifestyle to be more...? Have you made any changes to your lifestyle in the past year to be more...?

# APAC consumers are expected to spend a larger proportion of their money on brands or products that are socially and environmentally responsible.

## How do we know?

- Compared to before the pandemic, some consumers expect to spend less money (38%) or buy fewer things in general (14%) post-pandemic.
- APAC consumers also expect to buy more from socially and environmentally responsible companies post-pandemic (33%)



n=6,060, 2021 APAC consumers from 10 countries  
Question: After the pandemic, will you/ your family be doing more or less of each of the following, compared to before the pandemic started? (Reported by net scores)

## So what?

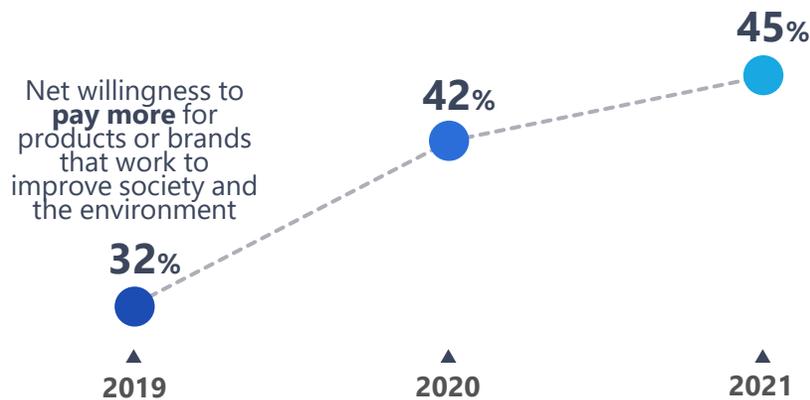
- Businesses that do not put a focus on being socially and environmentally responsible will be at risk of losing market share or left out by consumers.

**East vs West:** This pattern is more apparent in the Asia-Pacific region than in Europe and North America, where fewer consumers expect to spend less money post-pandemic (29% in Europe and North America) or buy more from responsible companies (25% in Europe; 22% in North America).

# A healthy and sustainable lifestyle is still too expensive to APAC consumers despite higher willingness to pay more for responsible products or brands.

## How do we know?

- Net willingness to pay more for products or brands that work to improve society and the environment increased continuously from 32% in 2019, 42% in 2020, to 45% in 2021
- Being too expensive remains the top factor preventing APAC consumers from living in a way that is healthy and sustainable (42%)



APAC consumers across three consecutive years  
 Question: Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree. – I am willing to pay more for products or brands that work to improve society and the environment. (Reported by net scores)

## So what?

- While many consumers are open to higher prices for responsible and sustainable products or brands, businesses should still prioritize affordability, or prove its value for money to allow more APAC consumers to adopt healthy and sustainable lifestyles.

**East vs West:** Consumers from Asia-Pacific, Europe, and North America all say that price is the top factor preventing them from living healthily and sustainably, while Asia-Pacific consumers are specifically showing the highest net appetite to spend more on responsible products or brands (45%) compared to 30% in Europe and 24% in North America.

Products that are long-lasting, use fewer resources, and use recycled/recyclable packaging are the most helpful actions from companies or brands to help support APAC consumers' healthy and sustainable lifestyles.

### How do we know?

- The top three ways that companies/brands can help facilitate APAC consumers' healthy and sustainable lifestyles include:



n=6,060, 2021 APAC consumers from 10 countries  
Question: Please rate each of the following actions from companies and brands as very helpful, somewhat helpful, a little helpful, not very helpful, or not at all helpful to help you live in ways that are healthy, environmentally friendly, and socially responsible. (Reported by Top-2-box)

### So what?

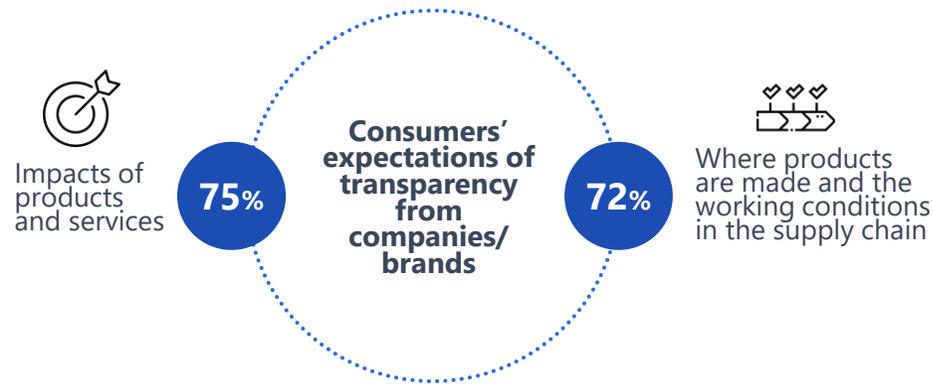
- Businesses that can demonstrate that they are doing better than their competitors in these areas would gain reputation among APAC consumers and are more likely to be seen as as sustainable and responsible.

**East vs West:** Consumers universally agree that offering durable products would be the most helpful way for companies and brands to facilitate more sustainable lifestyles.

# APAC consumers value companies and brands that are transparent about their products' impact and how they manage their supply chain.

## How do we know?

- APAC consumers find it helpful when companies and brands are transparent, specifically when it comes to the following:



n=6,060, 2021 APAC consumers from 10 countries  
 Question: Please rate each of the following actions from companies and brands as very helpful, somewhat helpful, a little helpful, not very helpful, or not at all helpful to help you live in ways that are healthy, environmentally friendly, and socially responsible. (Reported by top-2 box)

## So what?

- Businesses that are transparent about the environmental impact of their products and services and about their supply chain will create a higher brand trust with consumers, hence leading to enhanced brand loyalty.

**East vs West:** European and North American consumers value transparency from companies slightly more than APAC consumers when it comes to the impacts of products and services (Europe: 79% and North America: 77%) and supply chain origin and conditions (Europe: 73% and North America: 74%).



**GlobeScan is an independent, international insights and advisory consultancy.**

We work at the intersection of sustainability and ESG, brand and purpose, trust, and reputation. We partner with leading businesses, NGOs, and governmental organizations to deliver insights that guide decision-making and build strategies that contribute to a sustainable and equitable world.

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



**Healthy & Sustainable Living is GlobeScan's annual global consumer insights research program designed to help brands understand shifting preferences and behaviors related to healthy and sustainable living.**

Our research helps organizations learn how to engage consumers on wellness and sustainability issues and enable healthy and sustainable lifestyles.

Launched in 2019, this program consists of comparative and representative online surveys of 1,000 consumers in each of 30+ countries/regions.

*Contact our APAC team for more details or customised research briefings:*



**Victoria Gilbert**  
Director, APAC  
[Victoria.Gilbert@GlobeScan.com](mailto:Victoria.Gilbert@GlobeScan.com)



**Derek Wu**  
Associate Director, APAC  
[Derek.Wu@GlobeScan.com](mailto:Derek.Wu@GlobeScan.com)

 [twitter.com/GlobeScan](https://twitter.com/GlobeScan)

 [linkedin.com/company/globescan](https://linkedin.com/company/globescan)

 [insight@globescan.com](mailto:insight@globescan.com)

 [globescan.com](https://globescan.com)