



Healthy & Sustainable Living

Global Consumer Insights

Towards the Future: *What's Next for Healthy and Sustainable Living*

Webinar | March 22nd, 2022



Speakers



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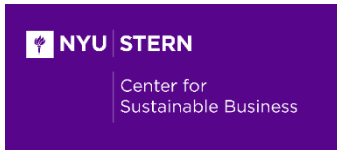
Founding Partner
M&C Saatchi LIFE



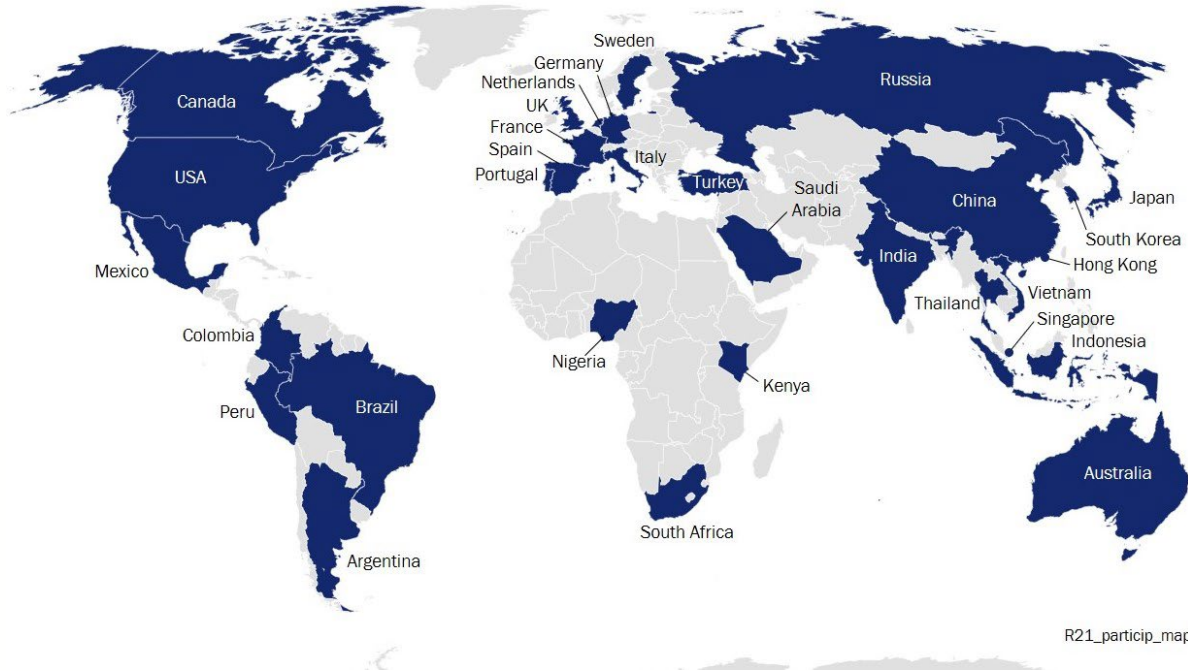
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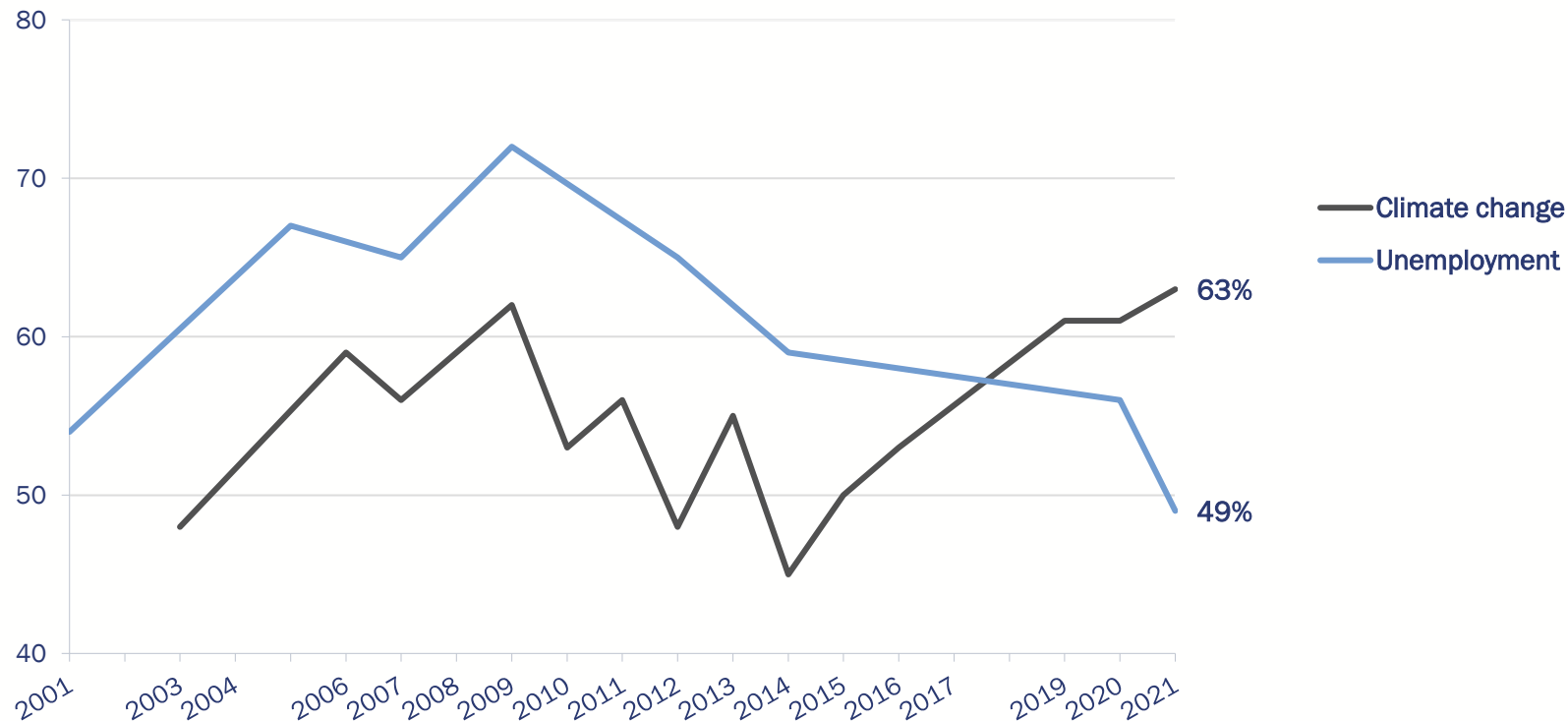
Methodology Review



- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong and Singapore) ($n=30,352$)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June and July 2021
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.

Climate change is now a greater concern than unemployment as environmental topics become more tangible

Seriousness of Global Problems, “Very Serious,” Average of 17 Markets, 2011–2021



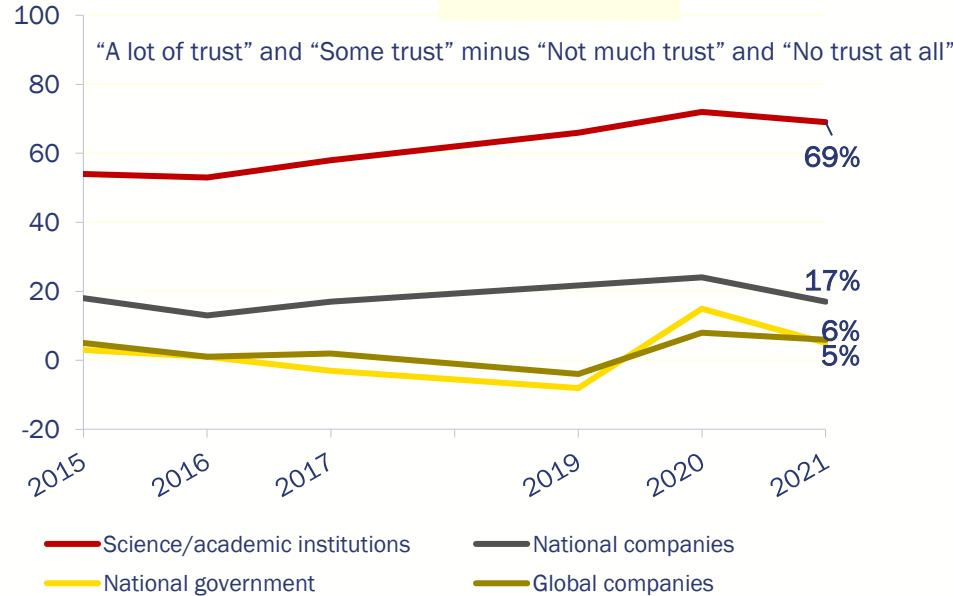
Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all markets in all years. Before 2019 this question was asked using an in-person and telephone methodology.

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.

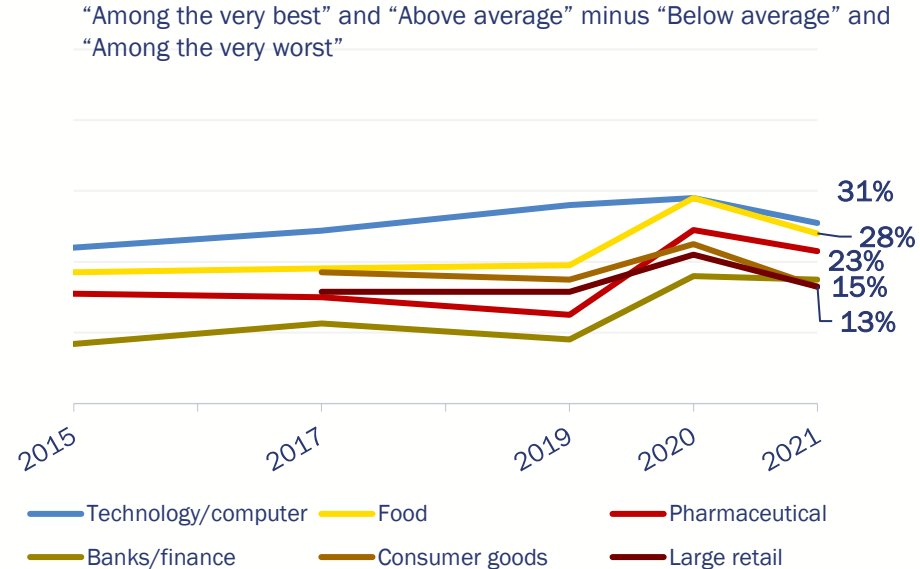
Trust has dipped after the COVID-19 “bounce” as goodwill starts to fade

Trust / CR Performance, Net Trust/Performance, Average of 17 or 18 Markets, 2015–2021

INSTITUTIONS



SECTORS



T3. 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...?

Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA.

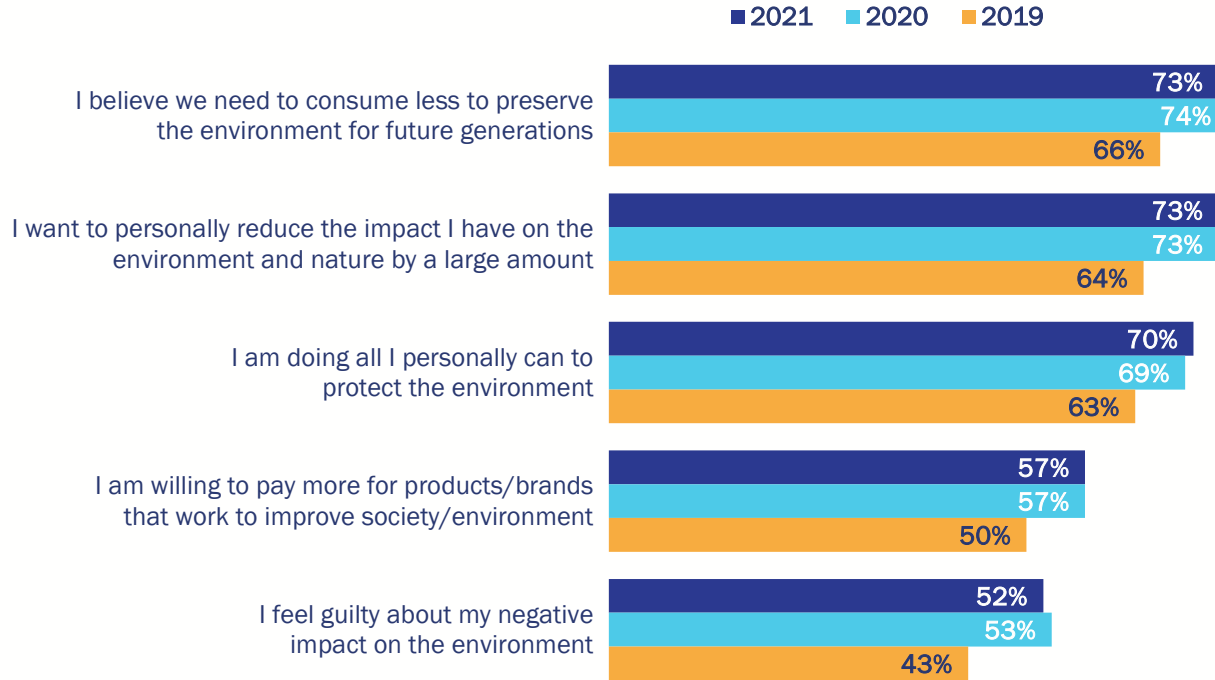
T22. Please rate each of the following types of companies on how well they fulfil their responsibilities to society compared to other types of companies.

Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA.

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

After a significant increase in pro-environmental attitudes from 2019–2020, levels remain stable

Environmental Attitudes, “Strongly Agree” and “Somewhat Agree,” Average of 24 Markets, 2019–2021

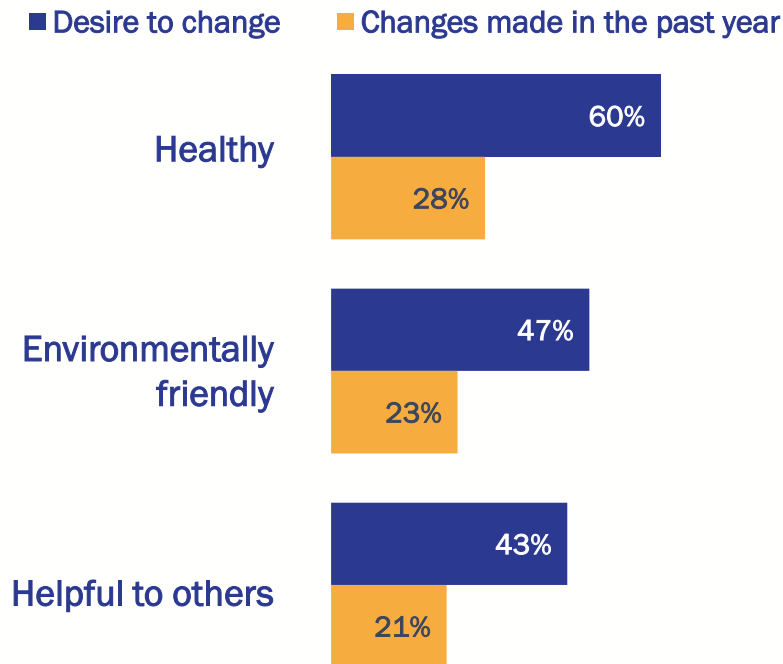


*For consistent tracking, this chart does not include Colombia, Netherlands, Peru, Portugal, Singapore, Thailand, and Vietnam, as these markets were not surveyed in 2019.

Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.

There is also strong desire to be healthier and more sustainable, however the aspiration-action gap persists

Desire to Change vs Changes Made to Lifestyle, Average of 31 Markets, 2021



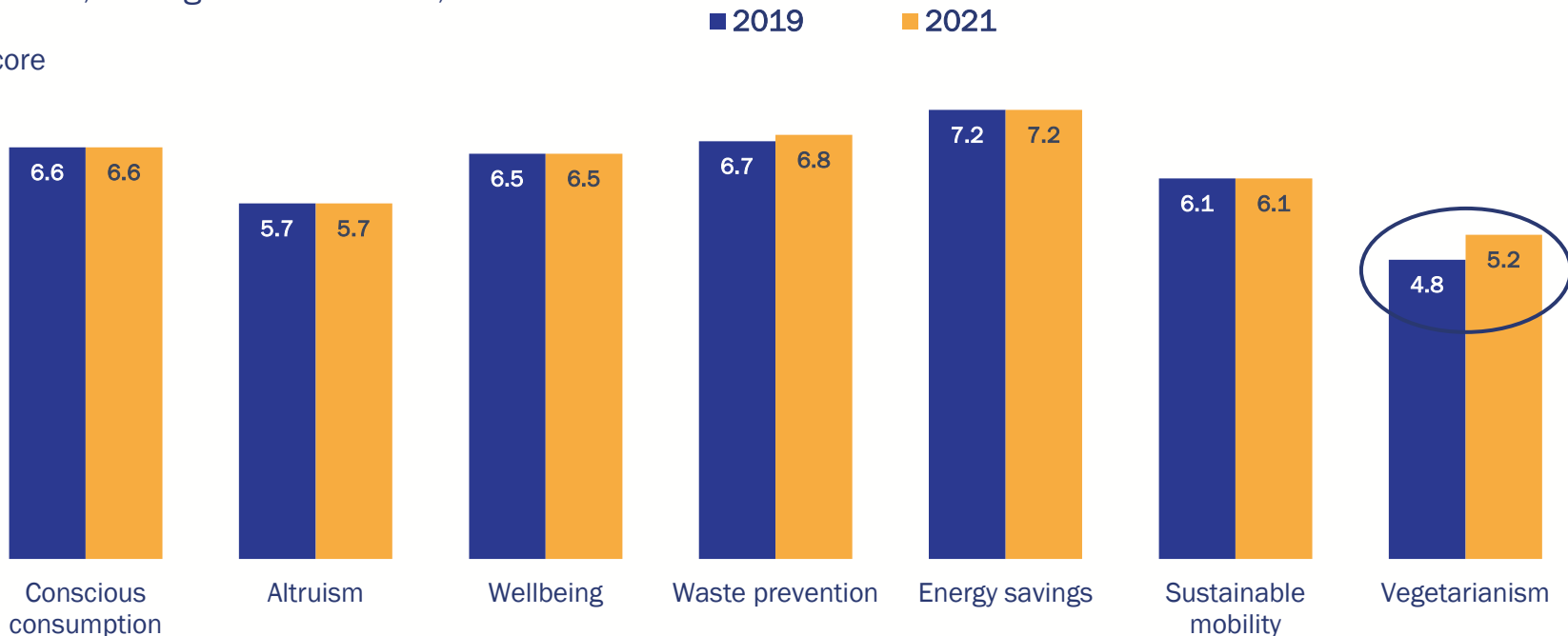
Q2. How much would you like to change your lifestyle to be more...?

Q3. Have you made any changes to your lifestyle in the past year to be more...?

Looking at specific behaviors, there has been little movement overall, except for eating more plant-based foods

Sub-indices, Average of 24 Markets, 2019–2021

Index score

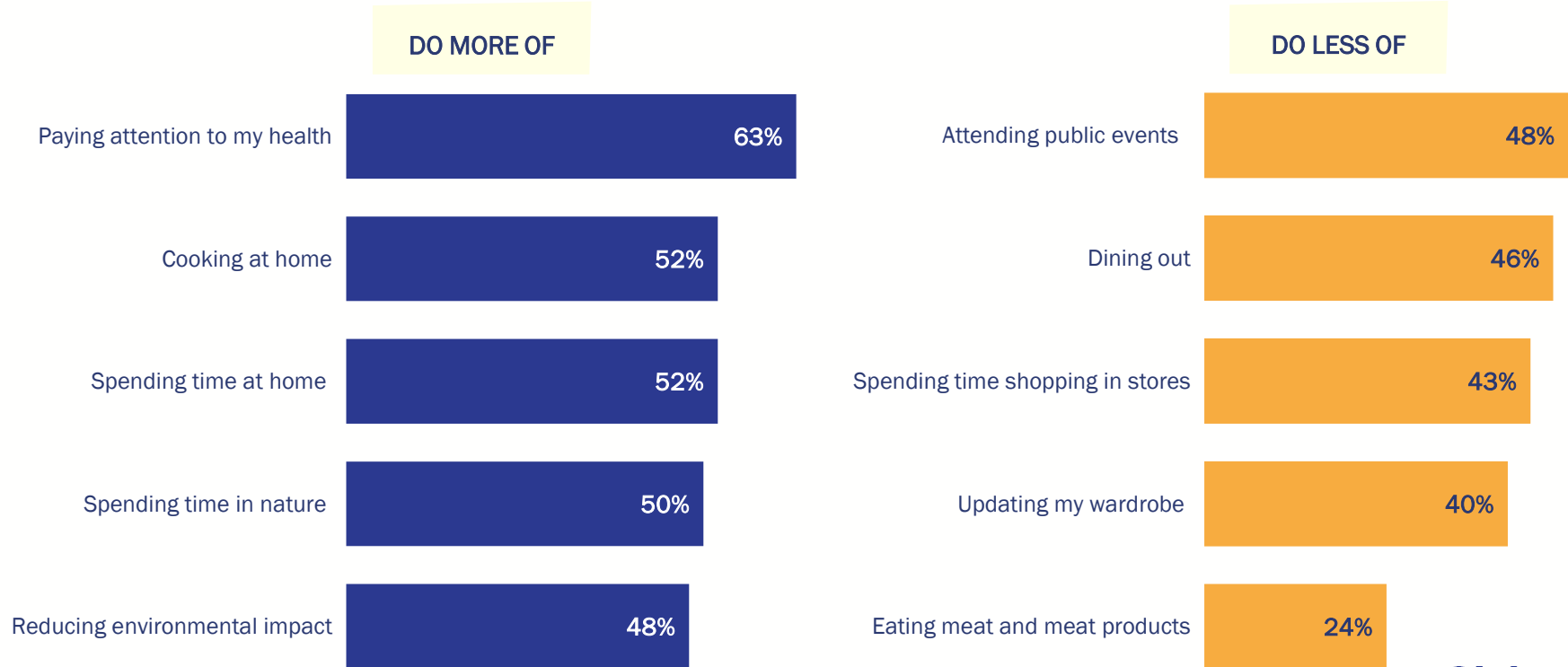


For consistent tracking, this chart does not include Colombia, Netherlands, Peru, Portugal, Singapore, Thailand, and Vietnam, as these markets were not surveyed in 2019.

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.

Many consumers will continue to be more home- and health-focused after the pandemic, as well as being more environmentally conscious

Daily Life after the Pandemic, Average of 31 Markets, 2021



People are expecting more not just from governments, but from companies as well

Barriers to Improving Lifestyle to Be Healthier and More Sustainable, Total Mentions, Average of 24 Markets, 2021

47%

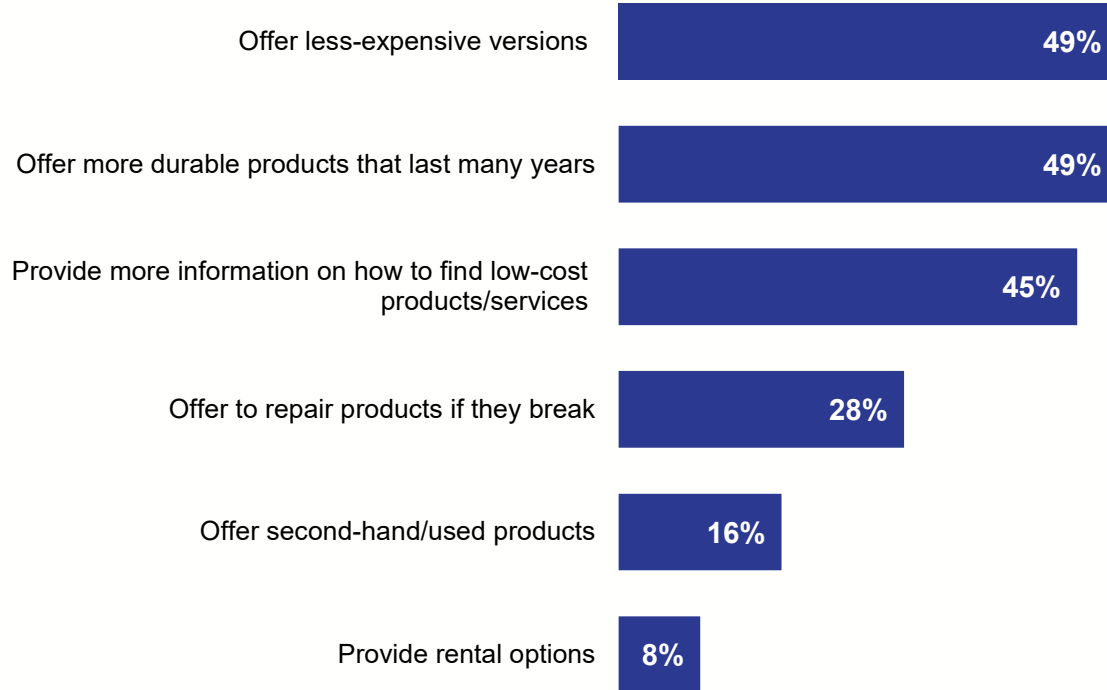
Say not enough
government
support

34%

Say not enough
company
support

Affordability and durability of products are important for consumers to help them live healthier and more sustainable lives

Ways to Make Healthy and Sustainable Products More Affordable, Selected Responses, Average of 31 Markets, 2021



Discussion and Q&A



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Healthy & Sustainable Living

A Global Consumer Insights Project

2022

Timing

- **March/April:** Questionnaire design
- **June:** Data collection across 30+ markets
- **July:** Analysis, sharing initial results with partners
- **August:** Full report
- **August–December:** Customized briefings

Benefits

- **Track the sustainability issues landscape** to better respond to the shifting context;
- **Deeply understand consumer trends** in attitudes and behaviors on healthy and sustainable living;
- **Leverage insights to educate and align** internal functions on emerging opportunities.

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