

2025

Conscious Consumer Report



PublicInc.

hi Introduction

If sustainable purchases aligned
with consumer intentions,
conscious consumerism would
account for over

70%

of all purchases.

We've all seen the reports:

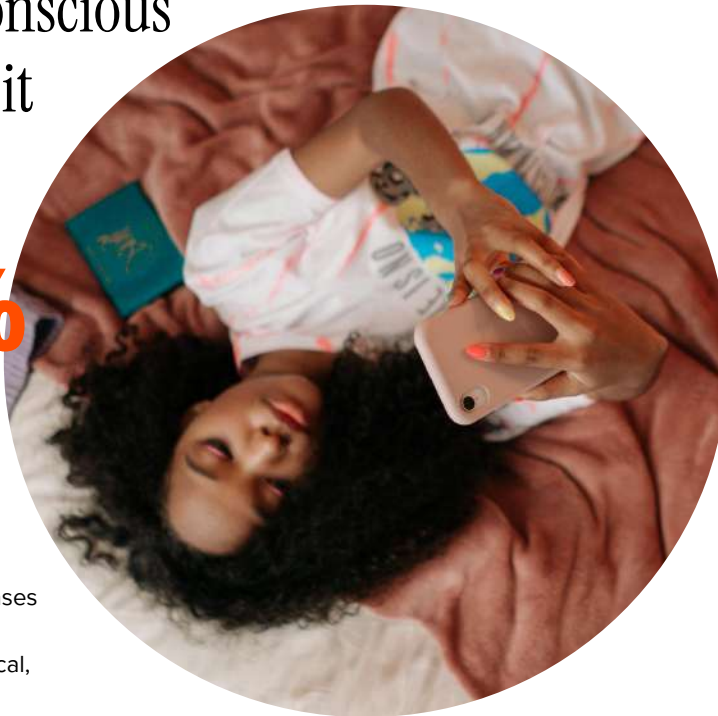
Consumers have an overwhelming appetite for sustainable products and services. They'll even pay a premium for them.

But we know from our decades as impact marketers that reality hits different. While the sustainable economy is growing, it's not matching the supposed appetite for sustainable products.

Instead Public Inc.'s Conscious
Consumer Index finds it
sitting at a modest

38%

This index reflects the average portion of purchases considered "conscious" - defined as products or services made with consideration for social, ethical, or environmental factors.

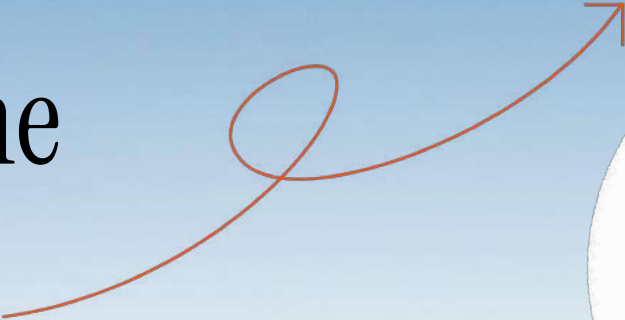


This is the say-do gap

—the chasm between what
consumers claim to value and what
they actually buy.

Some attribute it to cost. Others blame availability, perceived effectiveness, and understanding. Until now we've been unable to pinpoint a central culprit due to a lack of insight into the tradeoffs consumers are willing or unwilling to make.

We set out to demystify the say-do gap



and identify the strategies for closing it.

To grow sustainable business, we have to improve our understanding of the barriers that impede purchase.

And in 2025, this understanding is more vital than ever—otherwise we risk stagnating growth of the sustainable economy, the success of which is critical in a highly turbulent socio-political landscape.



The findings outlined in this report offer marketers and sustainability leaders

insight to unlock the potential of the sustainable economy

This report was designed for companies offering exclusively sustainable products or companies with a combination of conventional and sustainable brands.

Who is (and isn't) a conscious consumer? What beliefs and behaviours drive conscious consumerism? And what product claims seal the deal with the sustainable shopper?

Executive Summary

1

Confusing claims are the #1 inhibitor of conscious consumerism.

49% of all consumers have walked away from products with confusing sustainability claims. The number skyrockets to 87% amongst the most conscious consumers.

To increase the rate of conscious consumerism in Canada and America, simplify language and tap into consumer motivations.

3

To unlock growth, speak to the flip-flopers.

3 out of 4 consumers view themselves as a conscious consumer, but only act accordingly approximately $\frac{1}{3}$ of the time.

The majority of consumers want to make the world a better place. Stop preaching to the converted, instead look to grow the congregation.

2

Talk about product benefits in the short term, not the long term.

Canadians and Americans respond better to statements with present day benefit vs future benefit

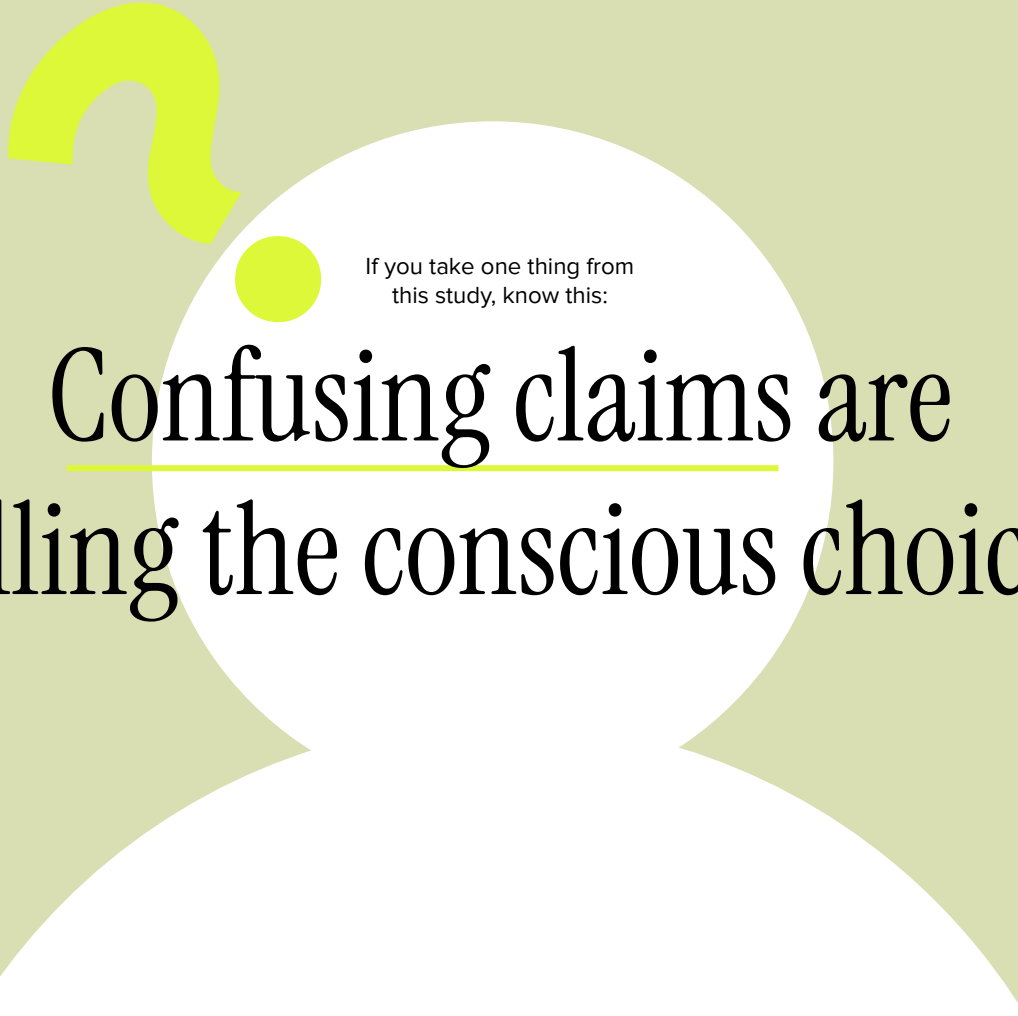
Overwhelmed consumers want to know how their purchase makes their life better or easier today, not in an abstract future that is becoming increasingly unimaginable as the world changes at a rapid pace.

4

Appeal to the “me consumer” not the “we consumer.”

Canadian and American consumers are motivated by language and claims that “meet their personal needs and values in the everyday”.

Green and science-based claims are the poorest performing motivators of conscious consumerism. The biggest factor that leads to purchase is a belief that “this product is valuable in my everyday life”.



If you take one thing from
this study, know this:

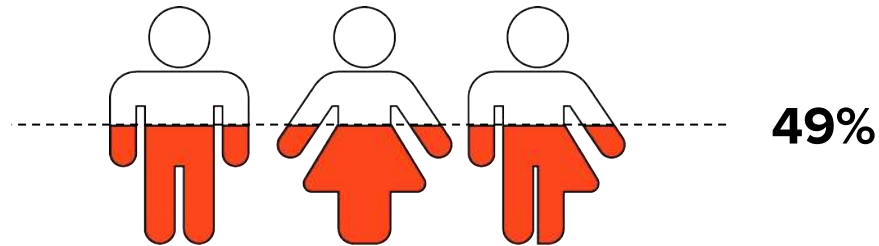
Confusing claims are
killing the conscious choice.

76% of Canadians and Americans say they are conscious consumers, but only shop their values 38% of the time.

The disconnect is frequently attributed to cost, ease of action, and perceived product effectiveness. But our research reveals a new top culprit: Confusing claims.

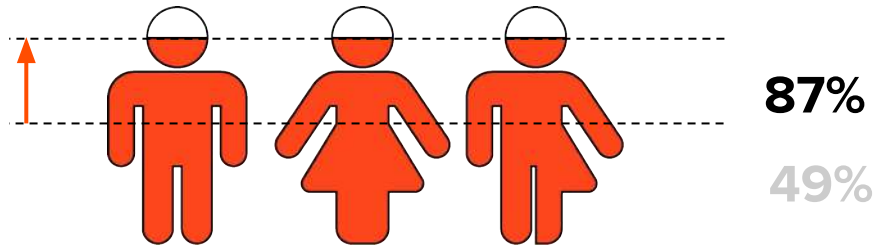
Brands with sustainable offerings are losing consumers by leading with confusing claims, language and messaging.

What do we mean by claims? A statement made by a company about the benefits, features, or performance of their product or service. This report is focused on consumer facing claims that appear in marketing and on packaging to promote the product and influence consumer decision-making.



1. Nearly 49% of all consumers have walked away from products with confusing sustainability claims.

Clear claims aren't just nice-to-have; they're the difference between closing the say-do gap and watching it grow wider.



2. This number skyrockets to 87% amongst the most committed conscious consumers.

For years we've been missing the mark on sustainability communications

Sustainability marketers have traditionally positioned sustainability as the primary selling feature, the opening and closing pitch. And for good reason, it stems from a belief that our offerings can drive social and environmental benefit. Surely consumers feel the same? But they don't.

Consumers - *people* - are focused on their own needs versus the

collective. They care deeply about the issues they feel most impacted by, like the economy, housing and healthcare.

We need to bring sustainability back from future abstraction ("better tomorrow", "a sustainable world for future generations", "creating a tomorrow that works for everyone") into present day value. And, of course, maintain compliance amid an

ever-growing body of green claims regulations.

Don't let the current news cycle confuse you: Sustainability messages from businesses still matter. In fact, they've never mattered more. If you operate responsibly, are good to your people, and sell products or services that help people and the planet, you can and should benefit.



Consumers - *people* - are focused on their own needs versus the collective.

And no, the say-do gap isn't all about the money

While cost is a factor, it's a gross oversimplification of why people don't make sustainable choices, because it is true of any purchase.

An abundance of research says people will pay more for sustainable products. An equal amount says cost is the #1 barrier to sustainable purchase. Confusing? Yes.

This paradox stems from the difference between conscious intent and unconscious behavior in shopping environments. Without distractions and trade offs, consumers are open to paying a premium.

In the shopping environment, time-pressed and distracted consumers are

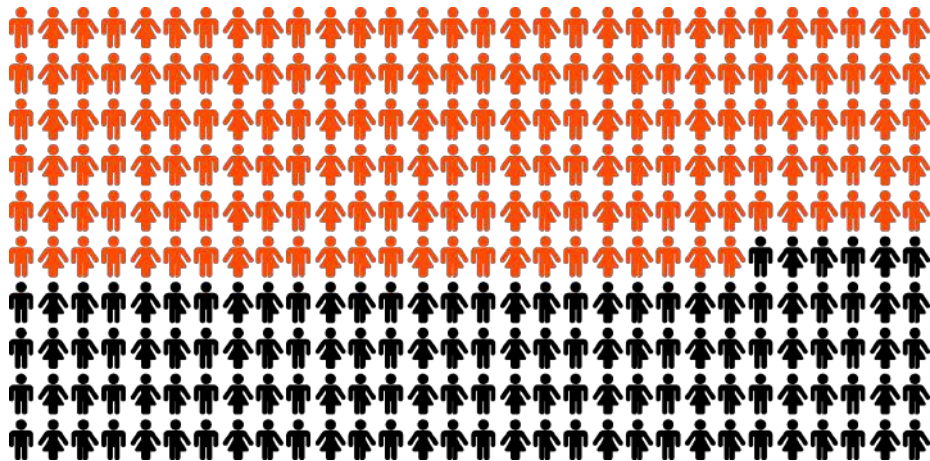
influenced by everything from what's in their bank account to what they ate yesterday. The unconscious mind takes over and they generally default to previous purchasing decisions.

While marketers always consider and navigate their pricing strategy, there are many other significant factors - internal and external to business - that impact the price of products and services. So while we did dig into the cost barrier, we have focused this report on the aspects marketers can directly influence, as we believe these will significantly impact the overall rate of conscious consumerism in Canada and America.



58%

of people surveyed said they **would pay more** for products and services that are ethical and sustainable.

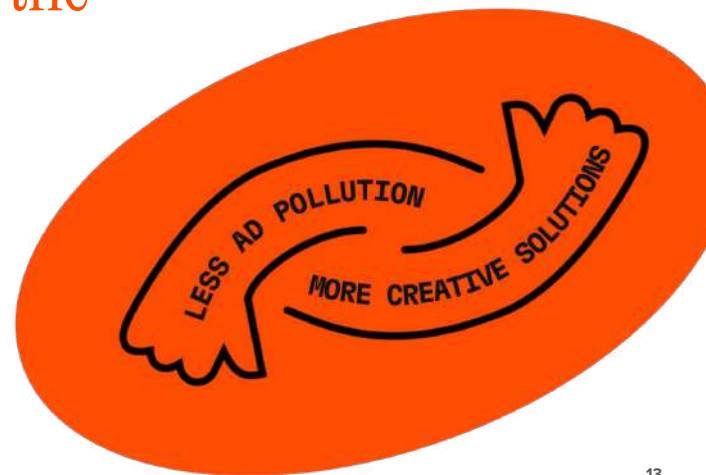


The difference between the cost of sustainable and conventional products is shrinking (according to a recent NYU Stern report) but few consumers are aware.

Nearly half of people surveyed disagreed with the statement that sustainable products aren't always more expensive than conventional products.

Given this snapshot of desire, confusion, and urgency, Public Inc. partnered with IPSOS to investigate the drivers of conscious consumerism and the claims that support purchase.

Our survey of over 3,000 Canadians and Americans offered up insights on how marketers can narrow the say-do gap.



First, we identified who is (and isn't)
a “Conscious Consumer”.



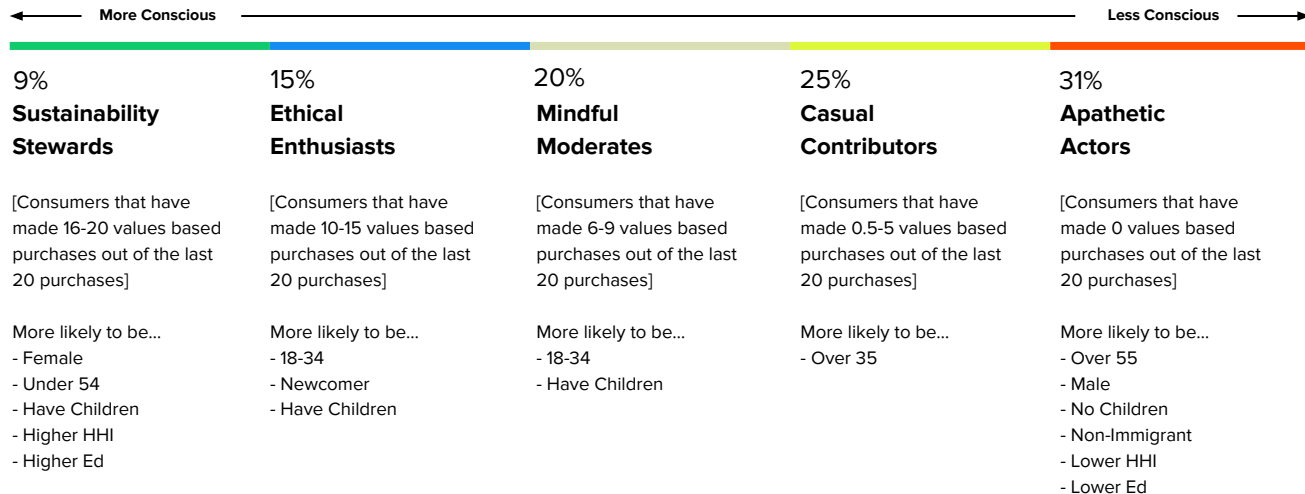
Meet the five conscious consumer segments

Segments are determined by the frequency of conscious consumer behaviour. At one end of the spectrum are Sustainability Stewards who shop their values 80-100% of the time. At the other end are Apathetic Actors who never do.

Sustainability Stewards tend to be women with higher levels of education and household income.

Men with lower levels of education and household income are more prominent in the Apathetic Actor category.

These findings trend alongside others that link conscious consumer behaviour to earning and education levels. However there are important new insights that add nuance to these segments.



New, surprising details



They're a little older than you think.

Conscious consumerism isn't a Millennial or Gen Z trend. It's a behaviour common to consumers under the age of 54. While consumers 55+ do make a significantly sharp turn toward the Apathetic Actor segment, marketers have narrow-casted the audience for sustainable products by skewing too young.

Americans are more conscious than Canadians.

The say-do gap is more pronounced amongst Canadians than Americans, with fewer Canadians falling into the Mindful Moderate, Ethical Enthusiast, and Sustainability Steward segments.

Newcomers are notable champions.

In Canada, immigrants are nearly 2x as likely to fall into the Sustainability Steward and Ethical Enthusiast segments; and significantly less likely to be an Apathetic Actor.

Adults with children have higher levels of conscious consumerism.

People without children are more likely to report low levels of conscious consumer behaviour, suggesting parenthood is a motivating factor in values-based purchasing.

01

Insight

Although the five conscious consumer segments vary in their frequency of sustainable purchases, there is significant belief and behavioral overlap indicating that **we can encourage all segments to increase their purchase frequency.**

Consumers agree:

Business plays a role in society. And money talks.

No matter how often they make values-based purchases, consumers are fairly unified in their perspective on the role business should play in society, and the actions they themselves are willing to take.

Climate change poses a serious threat:

82% 
agreeing

76% 
agreeing

The majority of people want to help make the world a better place.

82% 
agreeing

76% 
agreeing

Companies should be doing more in terms of sustainability and ethical best practices:

71% 
confirm

70% 
confirm

The majority of people believe that being purposeful in how they spend their money is one of the best ways to motivate companies to change.

79% 
agreeing

79% 
agreeing

Values are a growing influence on purchasing decisions.



Consumers trade one product for another based on social and environmental benefit.

If a product is totting a social or environmental benefit, consumers are likely to favour that option over another similar product.

“Trade offs” are most common in consumable (56%) and household cleaning products (54%). A notable portion of respondents have made similar trade offs for personal items (47%) and wearables (44%) indicating ethical considerations are also influencing personal and fashion-related choices.

Consumers are boycotting or buycotting brands that don't align to their values - a trend that will continue to grow in years to come.

Nearly half (43%) of Canadians and Americans report changing their purchase behaviour - such as boycotting a product or company - due to social or ethical concerns; a third (35%) have made such changes for environmental reasons. Over half (55%) of respondents indicate they are likely to change their purchase behaviours for social or ethical reasons within the next year. A further 50% say they will do so for environmental concerns.

A significant majority of
Canadians and Americans
subscribe to the benefits of
sustainable products and view
themselves as conscious
consumers.

They believe in the benefits of sustainable products...



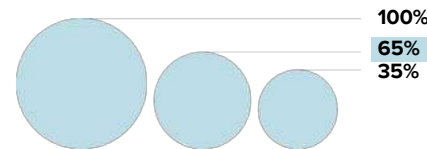
70% believe sustainable products make life better for people in the supply chain.



68% agree that sustainable products improve the health and well-being of their children and family.



75% believe that sustainable products make life better for future generations.



65% agree that sustainable products improve their own lives.

And a lion share see
themselves as a
conscious consumer.

75% 

76% 

75% of Canadians and 76% of Americans identify as a conscious consumer.

Implications

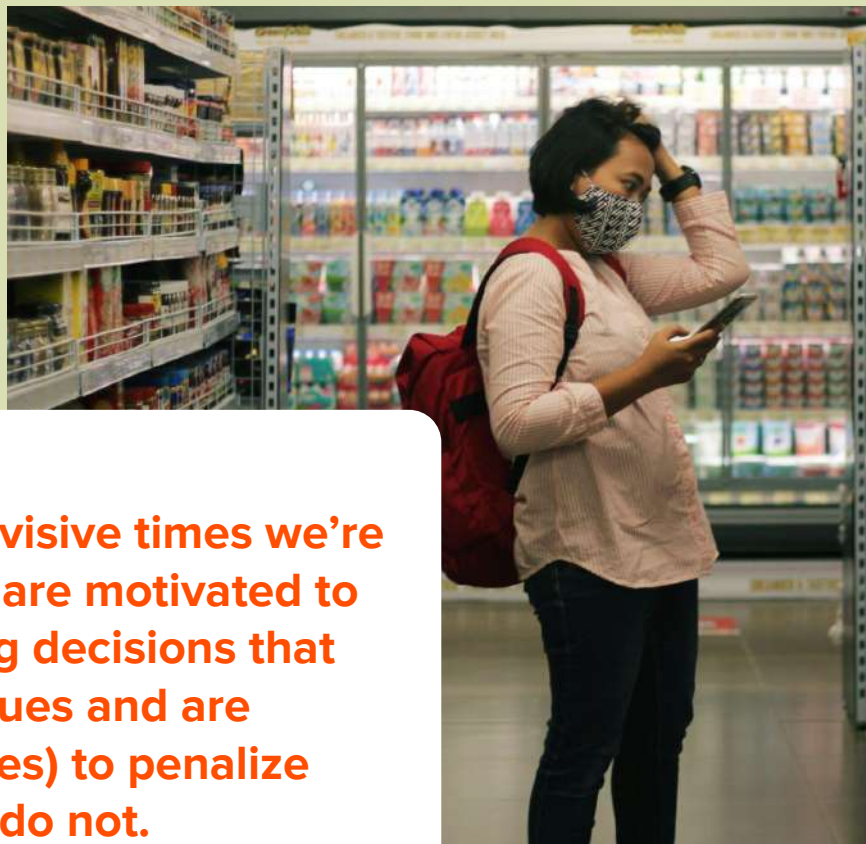
Here's the good news: The growth opportunity for sustainable business does not sit neatly within one consumer segment as traditionally thought. It sits within all, as this research shows.

From the skeptic to the true believer, the majority of consumers are predisposed to wanting to do the right thing.

A terrific example of this implication-in-action is YETI's outstanding success. The business, now valued at over \$3 billion, cornered the cooler market by offering a durable product at a premium price.

Their core audience (hunters and anglers) are not the typical target of sustainable brands and yet have responded positively to campaigns that link their durable products with waste reduction.

Despite these divisive times we're living in, people are motivated to make purchasing decisions that align to their values and are prepared (at times) to penalize businesses that do not.



02

Insight

To capitalize on consumer desire to make the conscious choice, we have to strengthen their ability to identify sustainable products and create clear **hero messages that convey immediate benefits.**

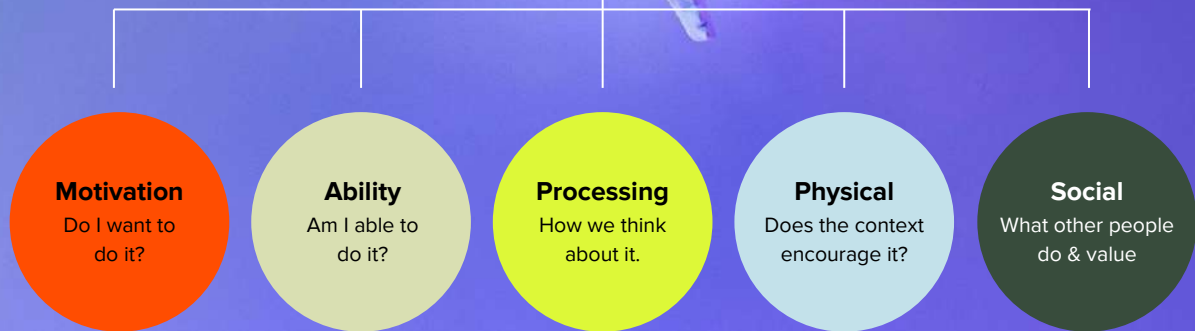
We set out to identify which behavioural drivers are most predictive of conscious consumerism

To understand the factors most and least associated with conscious consumerism we tested statements aligned to IPSOS' proprietary behaviour change framework, MAPPS.

MAPPS identifies five criteria that drive change. The insights produced from this analysis allows businesses to identify opportunities and gaps within services and strategies.

Of the five drivers, three rose to the surface as priorities for closing the say-do gap.

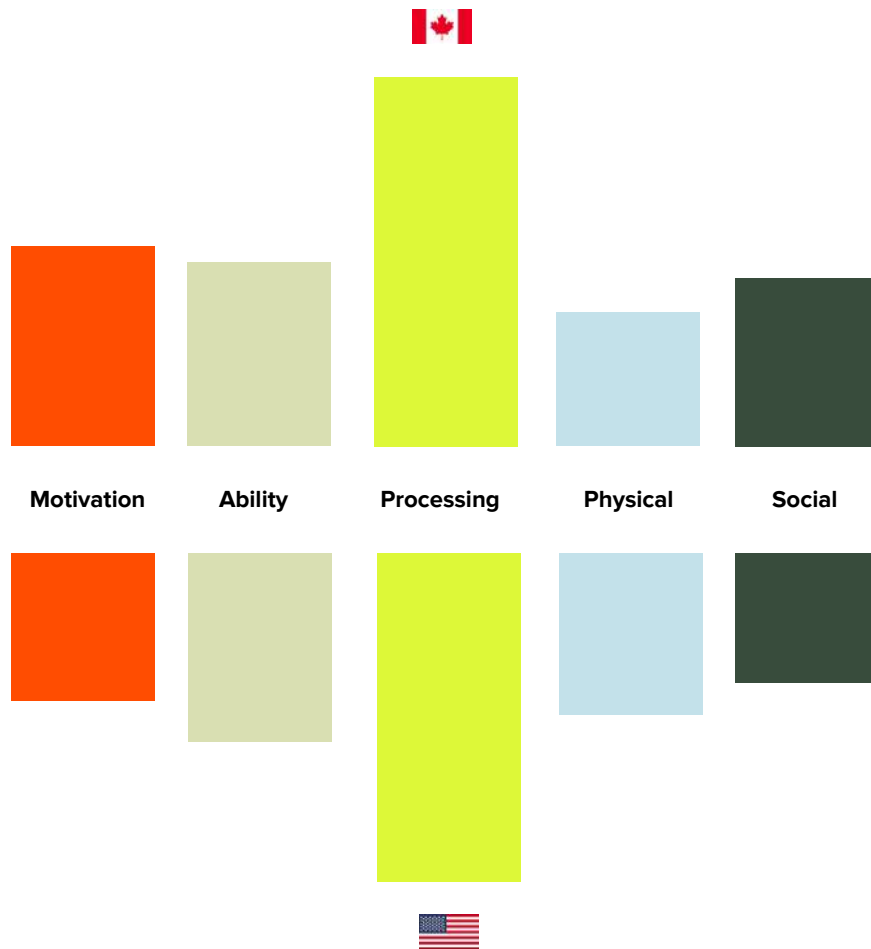
Behavior Change



Most importantly consumers have to know what they're looking for.

In both markets, the single most important factor impacting the level of conscious consumerism is the people's ability to understand and identify sustainable products (i.e., processing).

Our research shows that nearly 50% of all consumers abandon products due to confusing sustainability claims. That figure skyrockets to 87% amongst the most conscious consumers.



After understanding, Canadians prioritize motivational drivers while Americans prioritize ability.

This study produced few noteworthy differences between markets. This finding is the exception.

To tap into motivation

the benefit has to be now, not later.

Canadians and Americans respond better to motivational statements with present day benefit vs future benefit

Sustainable products
improve the health and
well-being of my children /
family



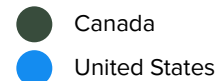
Sustainable products
improve my health and
well-being



Sustainable products make life
better for others in the supply
chain (the people and partners
involved in making / delivering a
product)



Sustainable products
make life better for
future generations



76%

of Canadian and American consumers say they are a conscious consumer,

yet only act on these values

38%

of the time.

How can marketers apply these learnings to bridge the gap between intention and action?



Implications

We need to empower consumers to make informed, sustainable choices while shopping. The most significant hurdle here is confusing product claims.

To tackle confusion, we must simplify sustainability claims across the consumer journey - from ads to shelf - clearly communicating the product's social and environmental benefit in a way that is easy to intuit.

When consumers are making purchasing decisions, it's crucial that the product messaging resonates with familiar, pre-existing concepts rather than introducing new, confusing claims. If consumers don't understand a sustainability message before they start shopping, they're unlikely to decipher it on the packaging.

FROM

TO

Energy efficient light bulbs



Reduce your energy costs

Natural cleaner



Free of ingredients that harm health and home

Ethically made



100% slave free

Note: To comply with green claims regulations (such as Canada's Bill C-59), all sustainable claims must be supported by evidence.

2

Implications

To drive action, we have to tap into a consumer's motivation to purchase sustainable products or services that unlock benefits today.

It's a fundamental human instinct to act in self-serving ways. People are more motivated by tangible, immediate needs—such as a cleaning product that works well, a car that's reliable for long trips, or a shirt that doesn't shrink or fade after a few washes.

Sustainability marketing often overlooks this reality, especially when it comes to messaging about the planet. Appeals to “future generations” or “a better tomorrow” fall flat with today's overwhelmed consumers. They want to know how their purchase makes their life better or easier now, not in some distant future.



03

Insight

Canadian and American consumers are
drawn to claims that speak to me, not we.

Digging into claims confusion

Equipped with the knowledge that consumers are motivated to purchase sustainable products with present day benefits to people, **we set out to understand which claims are most influential**. We tested 16 claims in the wearable and consumable categories.

Consumables and wearables were selected due to size and relevance to daily lives.



Consumables

Essential goods

CLAIMS TESTED

- Locally sourced from [Canadian/American] farmers
- We never use antibiotics, synthetic hormones, or toxic pesticides
- Humanely raised (fresh air, sunshine, pasture)
- Fair working conditions
- Plastics free
- For every product purchased, a portion of proceeds go to social & environmental charities
- Certified organic
- Carbon neutral



Wearables

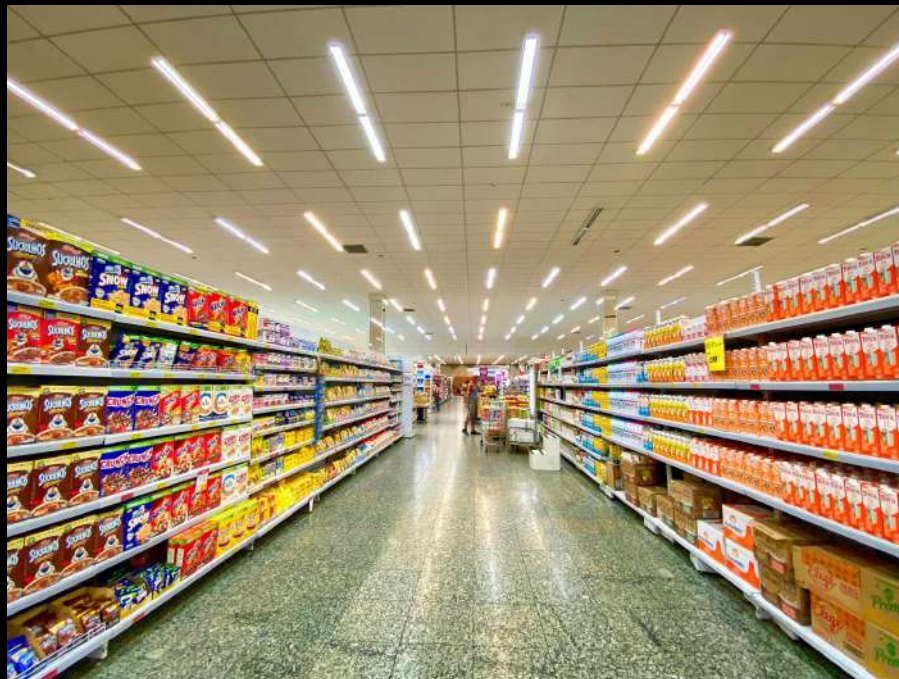
Essential and luxury goods

CLAIMS TESTED

- Made without chemicals harmful to humans
- Made to last (durability)
- Cruelty free
- Fair working conditions
- For every product purchased, a portion of proceeds go to social & environmental charities
- 100% recycled fibres
- Made with renewable energy
- Made with less water

CLAIMS

CONSUMABLES



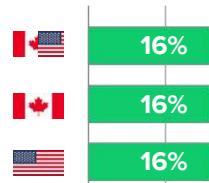
PERFORMANCE

Local sourcing and clean ingredients are the top performing consumable claims in both markets

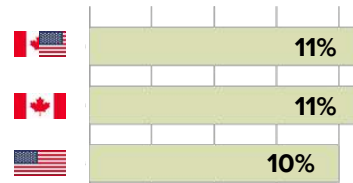
Locally sourced from (Canadian/American) farmers



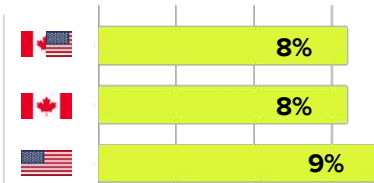
Humanely raised (fresh air, sunshine, pasture)



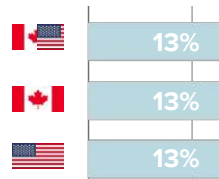
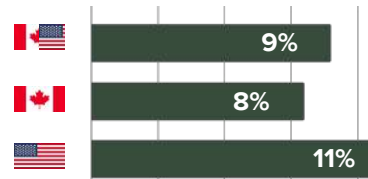
Plastics free



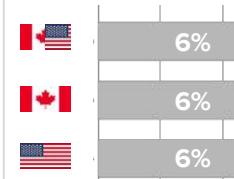
Certified organic

We never use antibiotics, synthetic hormones,
or toxic pesticides

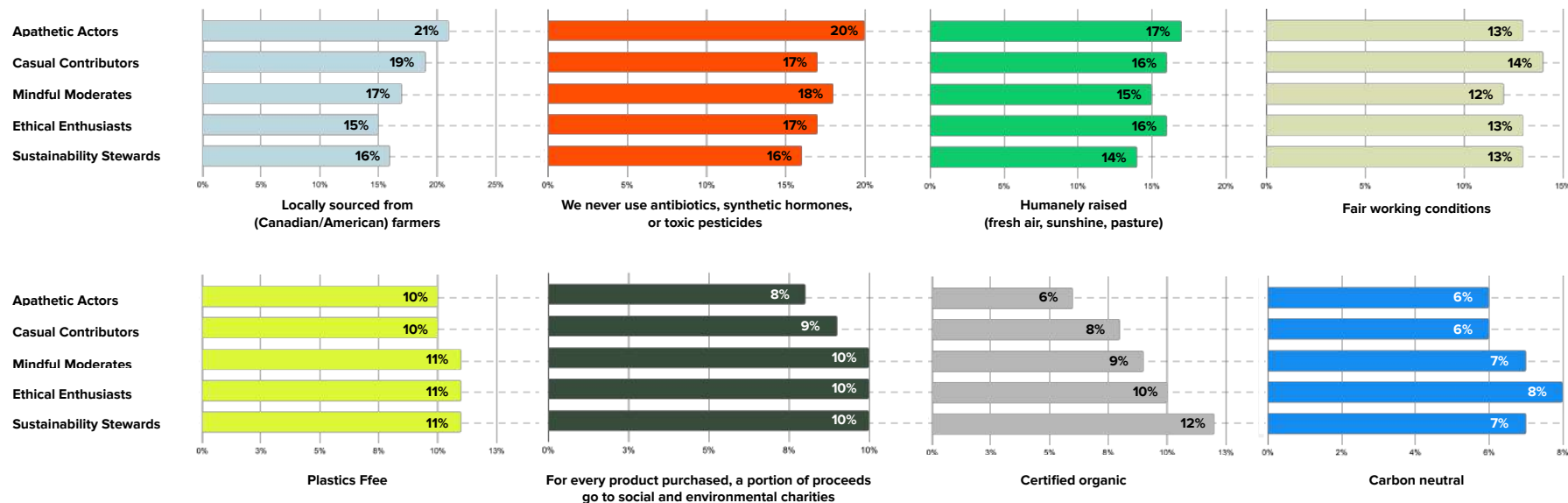
Fair working conditions

For every product purchased, a portion of proceeds go
to social & environmental charities

Carbon neutral



Segments respond to claims in the same way, regardless of frequency of conscious consumerism



KEY FINDING

Top performing claims involve personal (me) or animal benefit

“Locally sourced from Canadian/American farmers”, “We never use antibiotics, synthetic hormones, or toxic pesticides”, and “Humanely raised” consistently perform well across all markets and segments. “Fair working conditions” also performed well, but not as strongly as the top three.

Made locally and avoidance of harmful ingredients received equal support, suggesting that consumers are just as passionate about the origin of the products as they are about the safety and quality of the ingredients. Product origin (e.g., made locally) typically is associated

with supporting local businesses and economy, offering direct benefits back to the consumer’s community and therefore themselves.



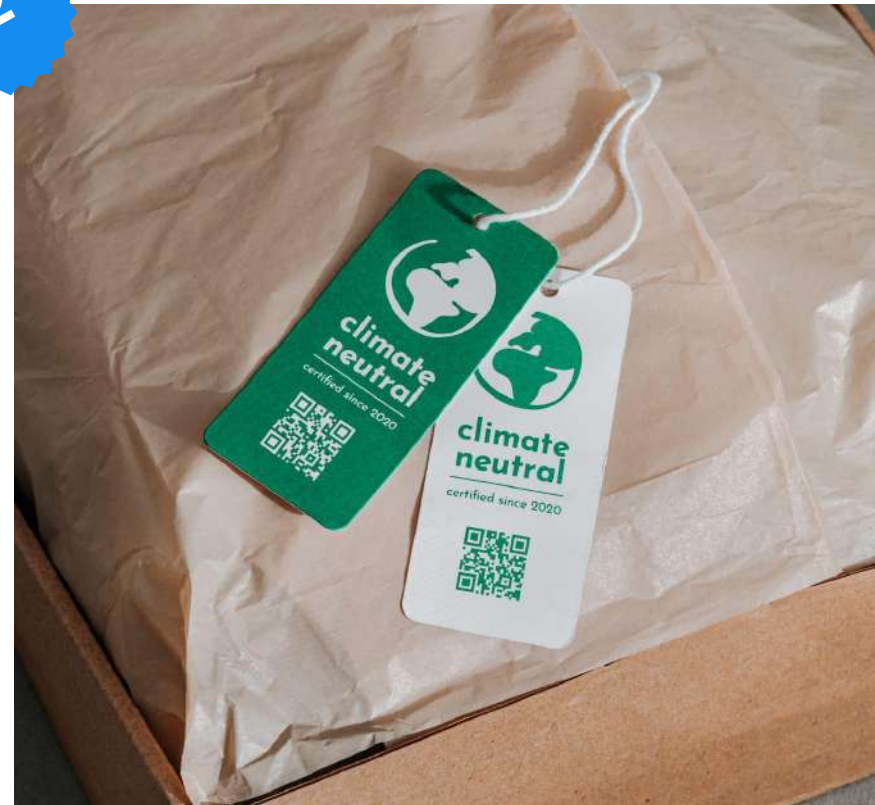
KEY FINDING

Lowest performing claims are environmental and science-based

Science-based claims like “certified organic” and “carbon neutral” perform low. In fact, “carbon neutral” is 3x less effective than the top performing claims, even amongst the most loyal conscious consumers. This is a significant finding.

These claims are too broad and intangible to everyday life. To move the needle on resonance, marketers have to tie these claims back to the consumer’s reality, knowledge and experience.

2



KEY FINDING

The hardcore conscious consumer is open to more claims

3

Sustainable Stewards—the segment with the highest levels of conscious consumerism—exhibit greater consistency across claims, showing less variance compared to other groups.

While they also favour claims that exhibit personal or animal benefit, they're more responsive to abstract or science-based claims than other segments. However, “carbon neutral” is an exception to this, performing as poorly within this group as it does in others.

A reasonable assumption to explain this trend is that, for this already

committed group, most sustainability claims in the consumable category can be effective. But remember this is a discerning group, so if you confuse them you lose them (as shown earlier, purchase abandonment due to claims confusion skyrockets to 87% in this segment).



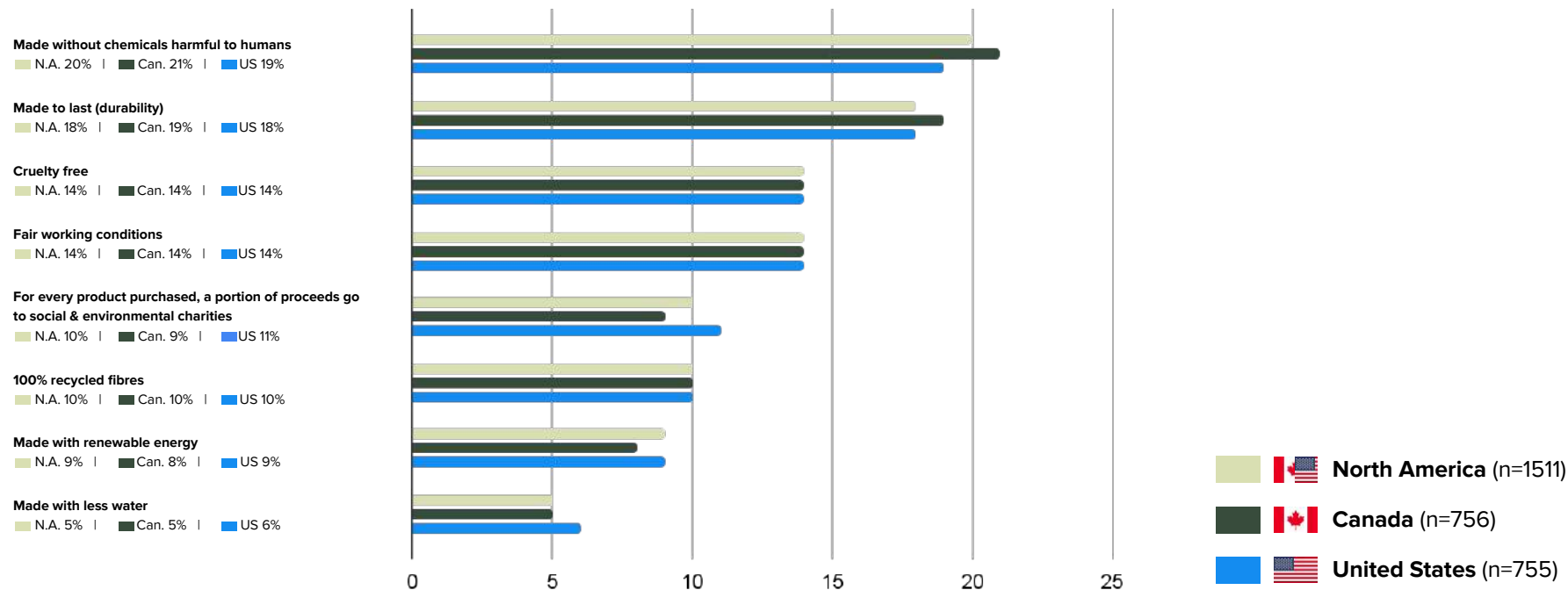
CLAIMS

WEARABLES

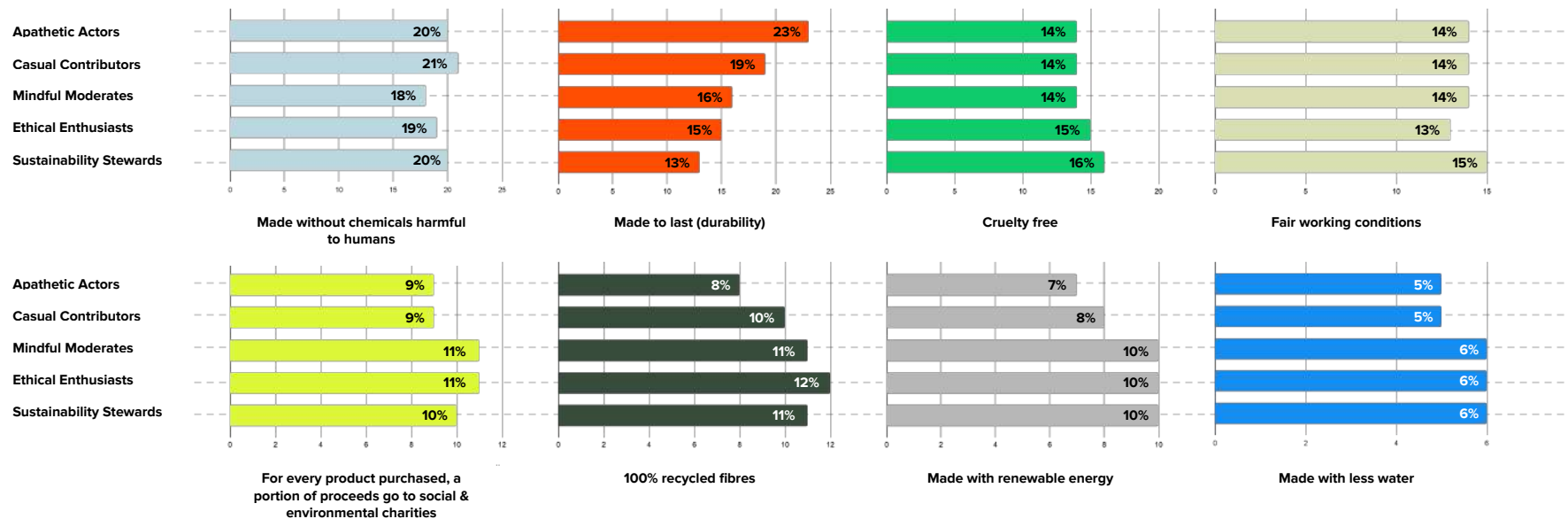


PERFORMANCE

Clean ingredients and durability are the top performing claims.



Although variance exists, conscious consumer segments respond fairly consistently to the same claims.



KEY FINDING

Consumers want to purchase products that are made well for me

In both Canada and America, ingredient safety is a top priority in the wearables category. Consumers want to feel just as confident about the items and ingredients they wear on their bodies as they do about the ones they consume. The top two performing claims focus on how the products are made, emphasizing reduced harm and product efficacy.

The strong performance of “made to last” is particularly noteworthy. This claim combines both sustainability (as durability reduces waste) and cost savings, making it highly effective. Though it sees a dip in the Ethical Enthusiast and Sustainability Steward

segments, it resonates exceptionally well with less active conscious consumer segments and offers a unique opportunity to motivate consumers to make more frequent conscious purchases.



KEY FINDING

Green claims are not a strong driver on conscious consumerism

Despite the fact that 8 in 10 Canadians and Americans agree that climate change is a serious long-term crisis, wearable claims related to environmental benefits (such as the use of recycled fibres, renewable energy, and reduced water usage) perform poorly in both markets and across segments. Notably, claims about water usage had particularly low resonance, performing 4x less effectively than the top performing claim of “made without chemicals harmful to humans”.

It is an uncomfortable but necessary reality to acknowledge that future-focused environmental

impacts often fail to capture the hearts, minds, and wallets of consumers today, given the numerous competing immediate interests.





IMPLICATIONS

It's about me, not we

Canadian and American consumers are motivated by language and claims that “meet their personal needs and values in the everyday”.

Science-based claims are failing to convert intention into behaviour. The consistent performance of claims across demographics and segments offers clear direction to marketers on how we should talk to consumers about sustainability (while keeping in alignment with green claims directives).

It is crucial to link the impact on people and the planet back to tangible consumer benefits. Durability serves as a compelling example of how this can be achieved.

BONUS INSIGHT

A note on the Apathetic Actor

The Apathetic Actor is often, and fairly, dismissed as an unreachable and immovable beast. But at 31% of the population, ignoring them feels like a massively missed opportunity.

While they certainly won't be the core audience for the majority of sustainable brands, their appetite for certain sustainably-linked claims shouldn't be overlooked by the businesses that serve them.

Apathetic Actors respond exceptionally well to the following claims:

- In the consumables category “locally sourced from [Canadian/American] farmers”, “we never use antibiotics, synthetic hormones, or toxic pesticides”, and “humanely raised (fresh air, sunshine, pasture)”
- In the wearables category “made to last (durability)” and “made without chemicals harmful to humans” claims

If you're a brand or business that serves the Apathetic Actor segment, we recommend new or continued investment in sustainable activities, products, and services with positioning aligned to these well-performing claims.

Conclusion

Forget the we consumer, growth is in the me consumer

To increase the frequency of conscious consumerism we must lead with clear, simple claims that emphasizes short-term personal benefits.

This **does not** mean dropping supply chain or environmental claims. But impact marketers can't ignore the biggest factor that leads to purchase—a belief that “this product is *valuable* in my everyday life”.

This is not antithetical to a sustainability message—the strong performance of the durability claim is proof. It shows the power of combining a traditional category claim (product effectiveness, performance) with a sustainability claim,

as also demonstrated in a recent NYU Stern study.

Consumers *want* to act in ways that support people and planet but marketers have made it more difficult by leapfrogging over their day-to-day needs and focusing on benefits that are either intangible or too far off for them to be relevant in the present.



Think beyond “the pack” and meet consumers where they are.

Opportunities and real-estate for storytelling on-pack are very limited.

Packaging, including product tags, should be viewed as the last opportunity to communicate with your consumer. Any language associated with your product or service should anchor a familiar message acting as a culmination of a holistic storytelling and marketing approach.

For inspiration, look no further than Tony's Chocolonely. The company spotlights their vision of 100% slave free chocolate in most of their advertising and cement this commitment not only on-packaging

but in the design of the chocolate bar itself (unevenly divided to reflect inequities in the supply chain).

It is essential, then, that marketers leverage other formats and channels to introduce sustainability messages to consumers. Other mediums allow for far greater flexibility in storytelling and help us meet consumers “where” they are with relevant sustainable messages.



DEPARTING



THOUGHTS



We have been trying to sell sustainable products by selling the idea of a better tomorrow.

And it's not working. Not at scale.

If we - as marketers and business leaders - continue to ignore the blinding reality that consumers act with self-interest, we will stunt the trajectory of the sustainable economy in a period where its growth is more important than ever if we stand a chance at tackling the staggering crises facing humanity.

It's time we try something new.

What if instead of selling the future, we
created it through short-term, sustainable
promises that ladder up to something better?



Public*Inc.*

imagine better imagine better imagine better

Appendix

Survey Methodology

The results are based on a 2024 survey of more than 3,000 consumers in the US and Canada conducted by Ipsos on behalf of Public Inc. The survey was conducted online with a nationally representative sample of n=1,510 consumers ages 18+ in the US and n=1,508 in Canada. The survey was conducted July 11- 24, 2024. The data have been weighted by age, gender, and region using the latest available census data for each country.

The precision of Ipsos online surveys is measured using a credibility interval. In this case, the survey is accurate to within ± 2.0 percentage points, 19 times out of 20, overall and within ± 2.9 percentage points at the country level.

The credibility interval will be wider among subsets of the population. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

IBN Analysis

IBN, short for Ipsos Bayes Net is a proprietary methodology that leverages Bayesian Network analysis to uncover insights from complex datasets. It is designed to model relationships and dependencies between variables, enabling a deeper understanding of the factors influencing consumer behavior and decision-making processes. IBN analysis answers the questions:

- Which variable(s), if changed, would have the largest predicted impact on the outcome of interest
- How much change will it produce.

How we used IBN Analysis

In our study, we conducted IBN analysis to understand the motivations and barriers to conscious purchasing. The analysis provided the relative impact of potential motivations and barriers, and how they intersect, ultimately rendering a set of pathways marketers can activate to drive greater conscious purchasing.

MaxDiff

MaxDiff, short for Maximum Difference Scaling, is a survey research technique used to measure preferences or the relative importance of different attributes. Respondents are shown a set of items and asked to indicate the most and least preferred options. This forced-choice method provides clear insights into which items hold the highest and lowest value for respondents.

The key advantage of MaxDiff analysis is its ability to produce a rank-order of items, which helps in making strategic decisions about which features or products to focus on based on consumer feedback.

How we used MaxDiff

In our survey, MaxDiff was used to derive the relative impact of ESG statements or claims in the consumable and wearable categories. Respondents completed a simple trade-off exercise indicating which statements/claims were most and least motivating in their decision to purchase. A total of 16 statements/claims were tested, 8 per category.