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CONSUMER SUSTAINABILITY REPORT 2025

Transforming sustainable growth strategies

How brands can shift sustainability from compliance to competitive advantage

The Consumer sustainability report 2025 is the definitive guide revealing how forward-thinking brands can transform sustainability into a powerful strategic differentiator.

This research-driven report reveals critical shifts in the consumer landscape, demonstrating why transformative sustainability is now a fundamental business imperative for long-term growth and brand loyalty.

Contents

Background to research

This research comes at a pivotal moment as brands grapple with balancing regulatory compliance and the demand for transformative sustainability. With 3,000 respondents, it offers a comprehensive snapshot of consumer attitudes towards sustainability across the United Kingdom.

The research was conducted by Censuswide with 3,000 nationally representative UK respondents (aged 16+) between 01/11/2024 and 06/11/2024.

Censuswide abides by, and employs members of, the Market Research Society and follows the MRS code of conduct and ESOMAR principles. Censuswide is also a member of the British Polling Council.

Executive Summary

Some of the key findings and recommendations for brands in the Consumer sustainability report 2025 include:

Brands must be more transformative to drive sustainable growth

Sustainability is no longer merely a compliance exercise; brands must lead with bold, transformative actions. While 84% of British consumers have made changes to be more sustainable, only 16% currently believe that most brands they shop with enable positive environmental change. Yet 57% believe sustainability-driven transformation provides a competitive advantage.

Demographic and behavioural shifts are redefining consumer beliefs

Younger generations are flipping traditional income-spending patterns on their heads. Especially when it comes to sustainability, with younger consumers' spending based on belief and value alignment, not just income. They are also more loyal to brands, and far more likely to influence and advocate among their friends, family and social networks.

Brands need to act as missional sustainability leaders

To capitalise on sustainable growth, brands need to build a mission, not just a product. 74% of advanced sustainability adopters value brands that offer them transparent, authentic value systems and demonstrate long-term sustainability commitments. Now is the time for brands to step back to the essence of what they take to market and transform the way they deliver it.

Sustainability leadership drives brand loyalty and positive advocacy

Transformative sustainability leadership secures high-value, loyal consumers who will amplify a brand's mission to their networks. 74% of Gen Z consider themselves influential in shaping others' sustainability choices.

Introduction

Moving from sustainability regulations to sustainability-driven transformation

Sustainability is no longer an option – it's the expectation.

Our research reveals that 84% of British consumers have already taken steps towards leading more sustainable lifestyles, with younger generations leading the way. The real question for brands isn't whether a material proportion of the market care about sustainability; it's whether your brand is doing enough to meet their expectations.

Product development is no longer about following sustainability regulations, which without intending to, restricts innovation and competitive opportunity. Instead, it's about creating a transformative movement that capitalises on emerging and current consumer behaviour by building a community through the development of transparent product eco-systems and creating new value in the market.

Our research shows that younger generations like Gen Z and Millennials are emotionally invested in sustainability, despite financial constraints, and that they demand authentic, mission-driven leadership from brands. With their influence growing across digital channels, the time for transformative sustainable action is now.

This report provides 5 key steps brands should implement to capitalise on the market opportunity presented within the sustainable growth movement in 2025. For brands that follow these steps, there is an opportunity to drive loyalty, advocacy and gain a long-term competitive advantage.

01 Brands must be more transformative to drive sustainable growth

Beyond compliance: the sustainability transformation imperative

84%

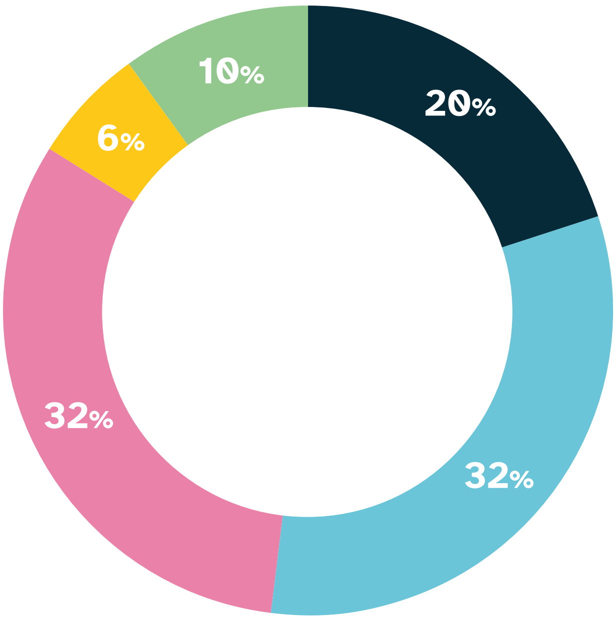
Of British consumers have made changes to be more sustainable.

Sustainability is now a key priority for many British consumers, but it extends far beyond simple compliance obligations.

Our research shows that brands need to take the lead with bold, transformative strategies, shifting from focusing energies on following regulations to driving proactive, innovative solutions that drive sustainable growth.

84% of British consumers have already made changes to be more sustainable. From making relatively easy lifestyle changes such as recycling properly or reducing energy and water usage in the home, through to using recyclable mugs, avoiding single-use plastics or making significant lifestyle changes such as changing their diet, owning an EV or installing solar panels.

Figure 01



- I have already made significant changes to my lifestyle to be more sustainable
- I incorporate some sustainable practices into my daily life, but they are not significant
- I have made some easy changes
- I am interested in making changes but have not yet taken steps
- I am not interested in making changes to be more sustainable

Our research shows a clear trend towards more advanced sustainability behaviours among younger, digitally mature and high-value British consumers, with a clear generational difference in sustainability behaviours between Generation Z (16-27 years old), Millennials (28-43), Generation X (44-59), Baby Boomers (60-78) and the Silent Generation (79+).

As seen in Figure 1 on the previous page, one in five Brits (20%) have already made those significant changes to their lifestyles mentioned above, demonstrating what we will call ‘advanced sustainability behaviours’. This increases to 29% of Gen Z, 31% of the most digitally mature consumers, and 33% of high-value consumers.

Nearly one in three (32%) have incorporated some sustainable practices and behaviours into their daily lives: what we will call ‘average sustainability behaviours’ such as using recyclable water bottles or coffee cups or making a conscious choice to avoid products that use single-use plastics.

Finally, there is a third group of 32% of Brits demonstrating what we will call ‘basic sustainability behaviours’ such as ensuring they recycle waste products properly or making a conscious effort to reduce the water or energy usage in the home.

Consumers admire brands that take a leadership role in sustainability

66%

Of Millennials admire brands that take a leadership role in sustainability.

While most British consumers are already making changes to be more sustainable, our research shows that there is a new generation of consumers that admire and want to shop with brands that take a leadership role in sustainability.

And that it is those younger, high-value consumers in particular who are asking for more guidance and leadership from brands to help influence their behaviours.

A brand’s sustainability practices are a key consideration when making purchasing decisions for over half of all British consumers, increasing to 62% of Gen Z and 75% of the advanced sustainability behaviours group, as you can see from Figure 2.

59% of all Brits admire brands that take a leadership role in sustainability, going beyond regulatory requirements. Increasing to 66% of Millennials, 71% of high-value customers, 74% of high digital maturity customers and 76% of advanced sustainability consumers.

Figure 02

A brand's sustainability practices are a key consideration in my purchasing decisions

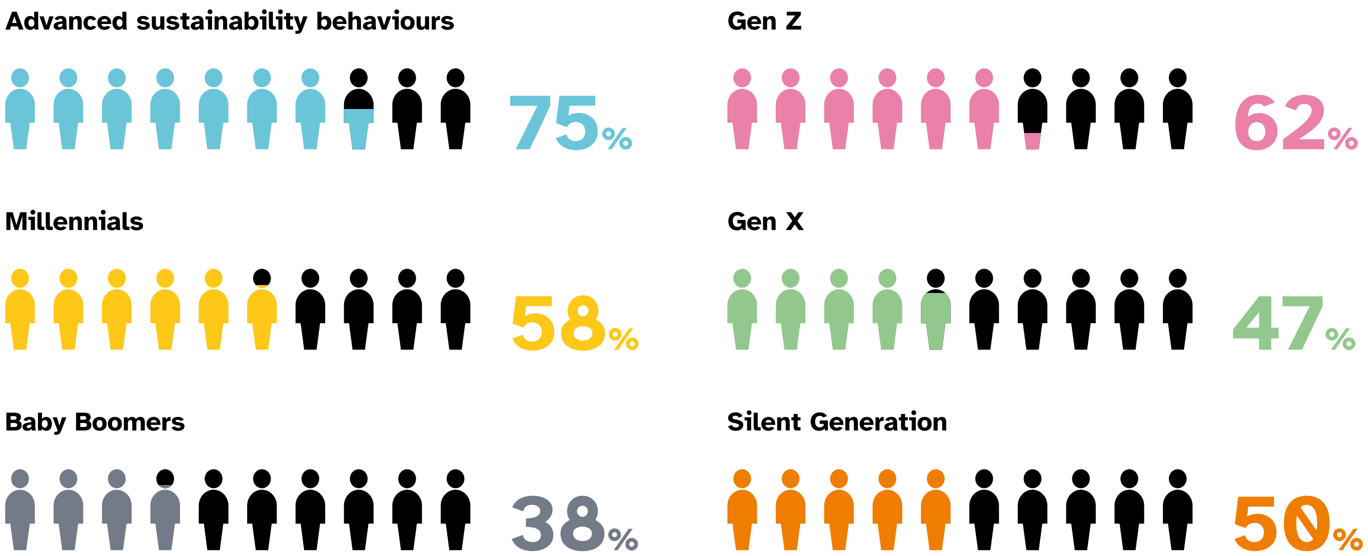
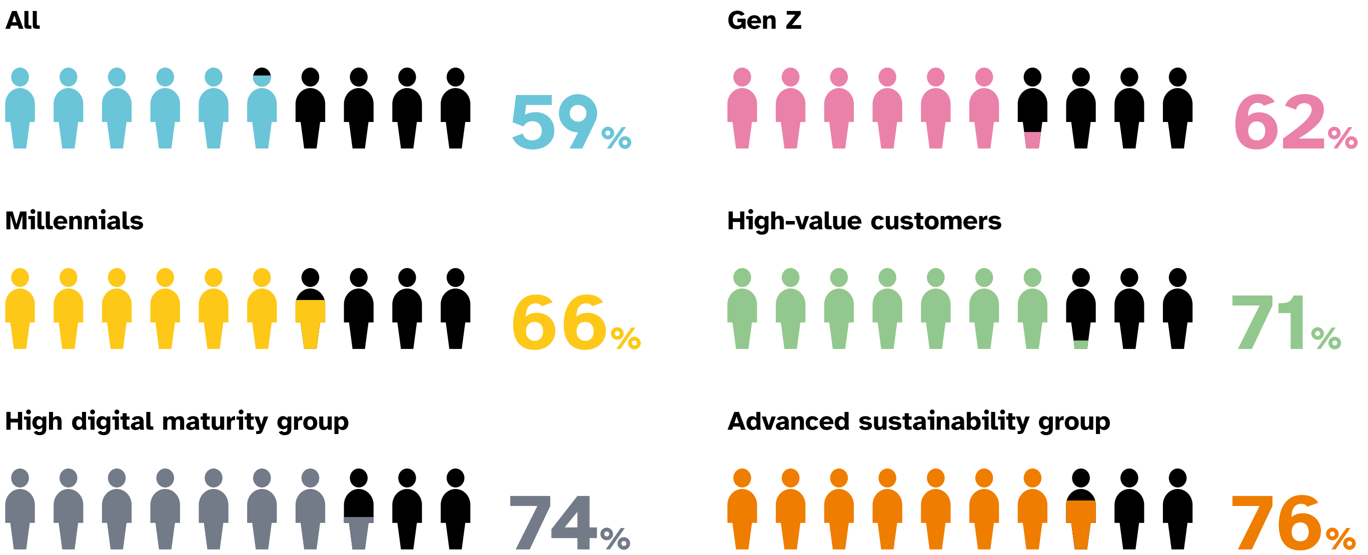


Figure 03

I admire brands that take a leadership role in sustainability, going beyond regulatory requirements



Sustainability-driven transformation provides brands with a competitive advantage

59%

Of Gen Z and 74% of advanced sustainability consumers believe sustainability-driven transformation provides brands with a competitive advantage.

Sustainability is no longer a compliance exercise, and brands must lead with bold, transformative actions. 59% of Gen Z and 74% of advanced sustainability consumers believe sustainability-driven transformation provides brands with a competitive advantage.

The message for brands is clear: competitive opportunity increases when brands innovate past sustainability regulation goal posts. And sustainability is now a critical business strategy, not just a corporate responsibility.

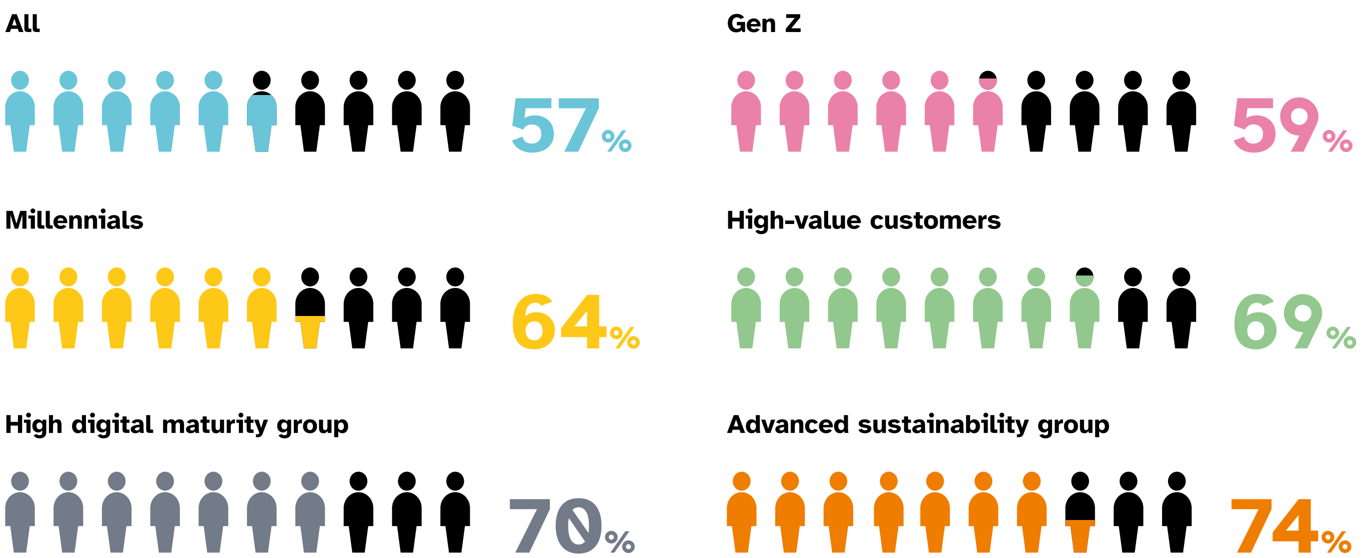
However, while 84% of British consumers have made changes to be more sustainable and most believe sustainability-driven transformation provides a competitive advantage, only 16% currently believe that most brands they shop with enable positive environmental change.

Over half (56%) of all consumers want brands to demonstrate a longer-term commitment to sustainability, increasing to 64% of Millennials, 69% of high-value customers and 74% of advanced sustainability consumers. Brits want to see brands doing a lot more, with a huge opportunity for those brands that demonstrate transformative approaches to create differentiation, customer loyalty and drive sustainable growth.

As you can see from Figure 4 below, most Brits believe that sustainability-driven transformation can provide brands with a competitive advantage. And this belief in brands that lead with bold, transformative actions is particularly strong amongst younger, high value, digital mature and advanced sustainability groups of consumers.

Figure 04

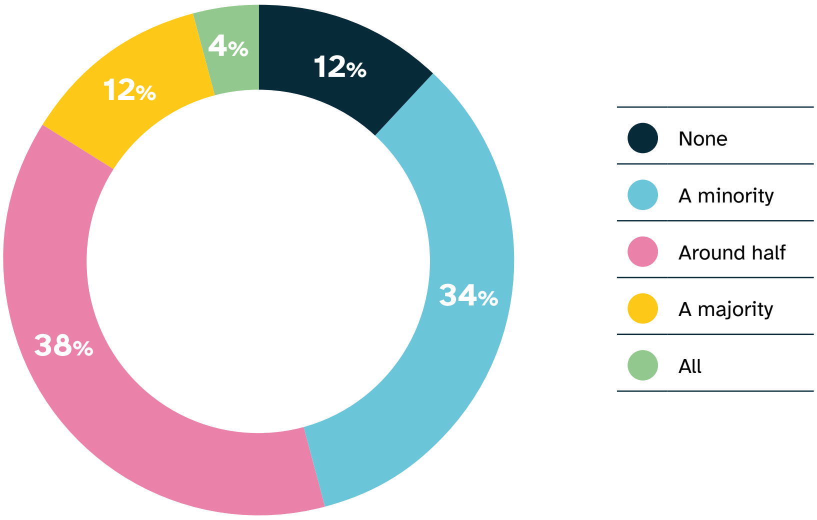
I believe that sustainability-driven transformation can provide brands with a competitive advantage



Our research also shows that there is a very clear disconnect between what consumers want from brands, which is transformative sustainability innovation and action, and what they currently think brands are offering them. As you can see from Figure 5 below, only a small minority (16%) feel that most or all the brands they shop with help enable them to make positive changes to help the environment.

Figure 05

Thinking about the brands you shop with, how many of them do you think help enable you to make positive changes to help the environment?



02 Demographic and behavioural shifts are redefining consumer beliefs

Generational dynamics reimagined – emotion and beliefs trump disposable income

66%

Of Gen Z have made advanced or average sustainability changes to their lifestyles and 57% are likely to engage with sustainable brands on social media.

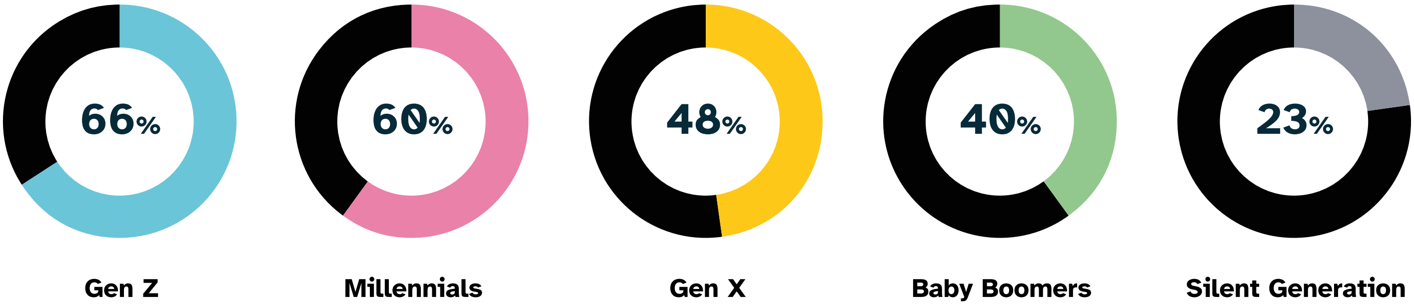
Younger generations are flipping traditional income-spending patterns on their heads. Especially when it comes to sustainability.

Our research shows that younger consumers' spending is based on belief and value alignment, not just income. Plus, they are also more loyal to brands, and more likely to influence and advocate among their friends, family and social networks.

Indeed, while one in five Brits (20%) have already made significant sustainability changes to their lifestyles, Gen Zers and Millennials are the most active and the most emotionally invested in advanced sustainability practices. As you can see in Figure 6 below, two in every three Gen Z Brits (66%) and 60% of Millennials have made either advanced or average sustainability changes to their lifestyles and consumer habits, compared to only 23% of the Silent Generation.

Figure 06

Those consumers that have already made either advanced or average sustainability changes to their lifestyle consideration in my purchasing decisions



Additionally, over half (54%) of Gen Z and 68% of advanced sustainability consumers would be willing to pay a premium for products or services from brands that are known for their sustainability efforts. And 57% of Gen Z and 66% of advanced sustainability consumers are far more likely to engage with brands that prioritise sustainability on social media or through other channels, as you can see from Figure 8, on the right.

Figure 07

I would be willing to pay a premium for products or services from brands that are known for their sustainability efforts

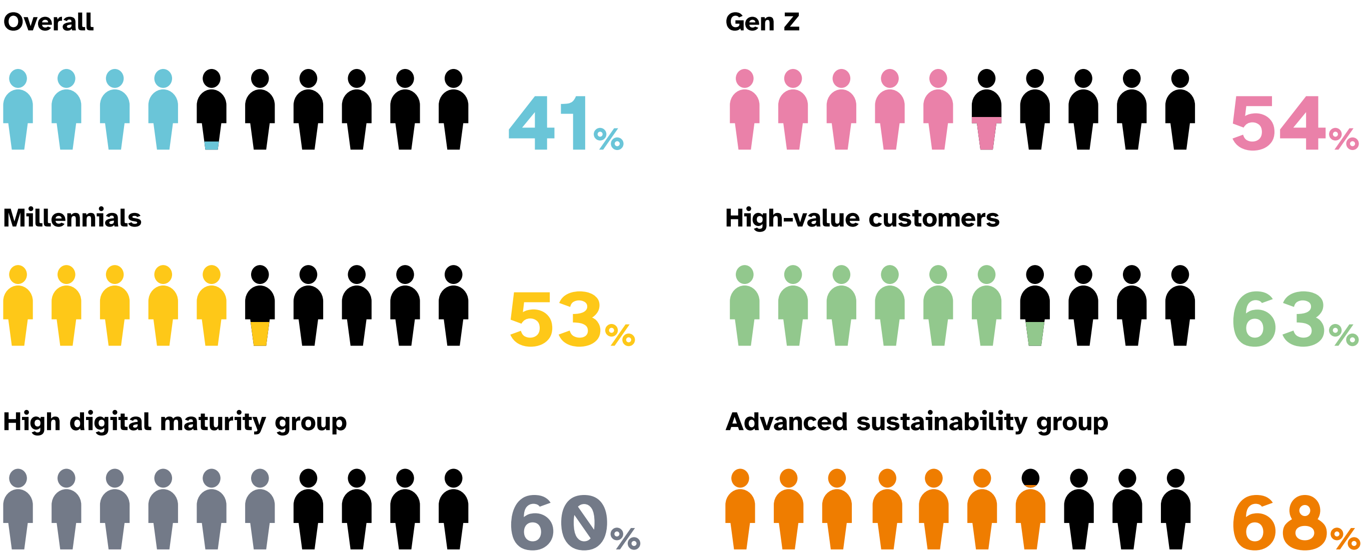
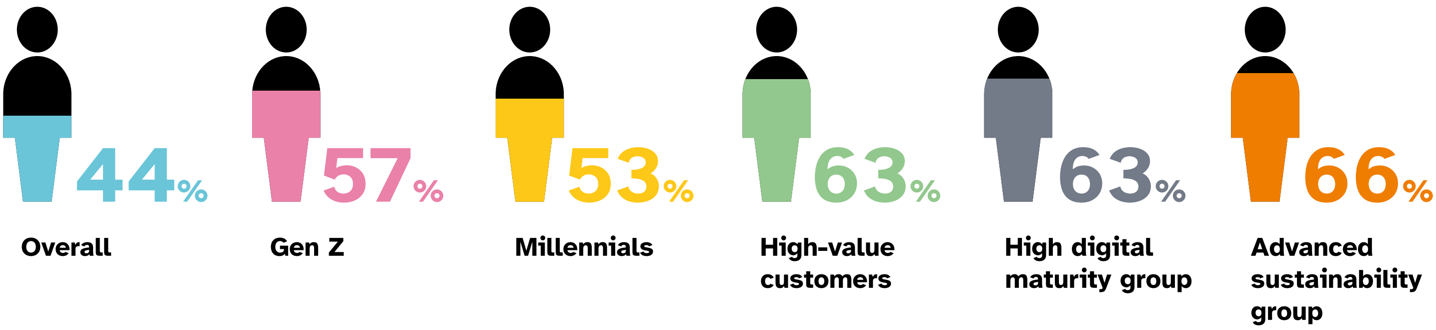


Figure 08

I would be likely to engage with brands that prioritise sustainability on social media or through other channels



Purpose-driven investment is driving sustainable growth and brand loyalty

67%

Of Millennials think it is important that brands are transparent about their sustainability practices and supply chains, and 60% are more likely to purchase products from brands that source materials ethically and sustainably.

Despite financial constraints, our research shows that younger, high-value consumers prioritise purpose-driven conviction over income.

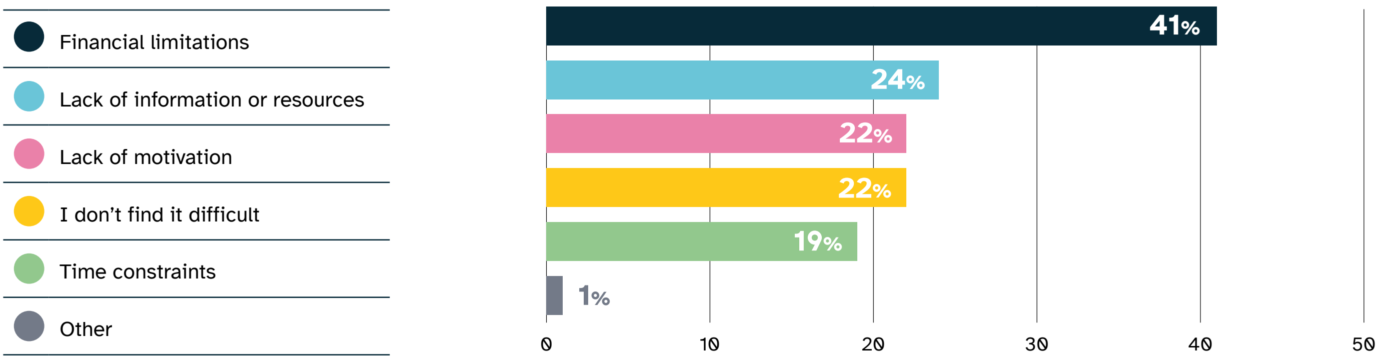
Gen Z and Millennials seek brands that resonate with their personal values and inspire action. And this emotional investment is driving sustainable growth and brand loyalty.

Over two in five Brits (41%) cite financial limitations as the primary challenge stopping them from being more sustainable, as you can see from Figure 9 on the following page. Yet we have already seen that a brand's sustainability practices are a key consideration when making purchasing decisions for 62% of Gen Z and 75% of advanced sustainability consumers. Plus, 69% of Millennials think it is important that brands are transparent about their sustainability practices and supply chains, and 60% are more likely to purchase products from brands that source materials ethically and sustainably.

Traditionally brands may have targeted new market entries at those with higher disposable income, but our research has identified that beliefs, convictions and emotions are, in fact, a core driver to sustainability-driven purchasing for consumers who fit a younger demographic.

Figure 09

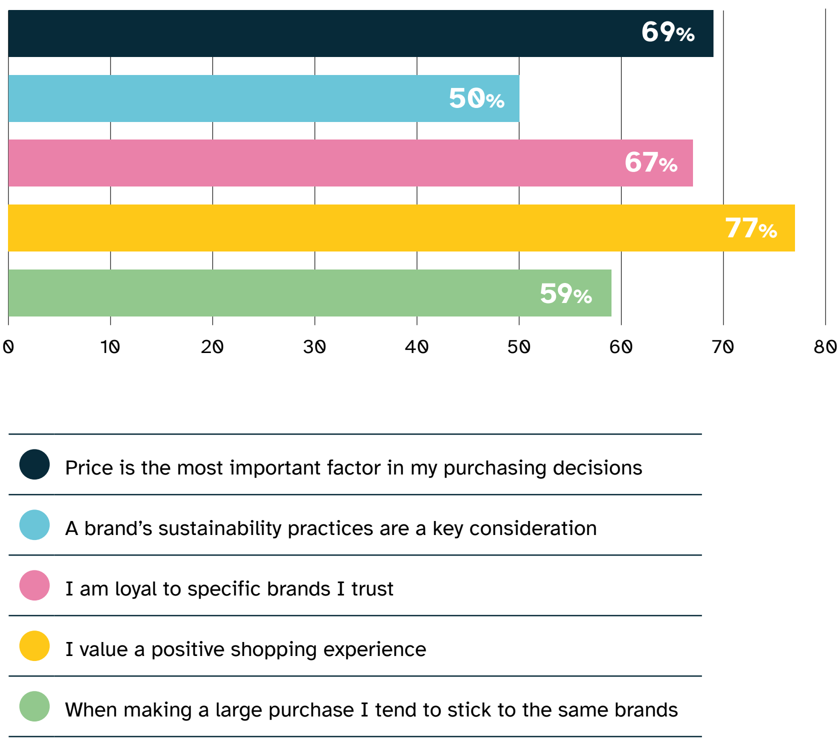
Why, if for any reason, do you find it difficult to be more sustainable?



Our research shows that consumers who are loyal to specific brands they trust are more likely to say that a brand's sustainability practices are a key consideration. As you can see from Figure 10 below, while price is the most important factor in most purchasing decisions (69%), a brand's sustainability practices are also a key consideration for half of British consumers (50%) and a high proportion of Brits (67%) remain loyal to specific brands that they trust.

Figure 10

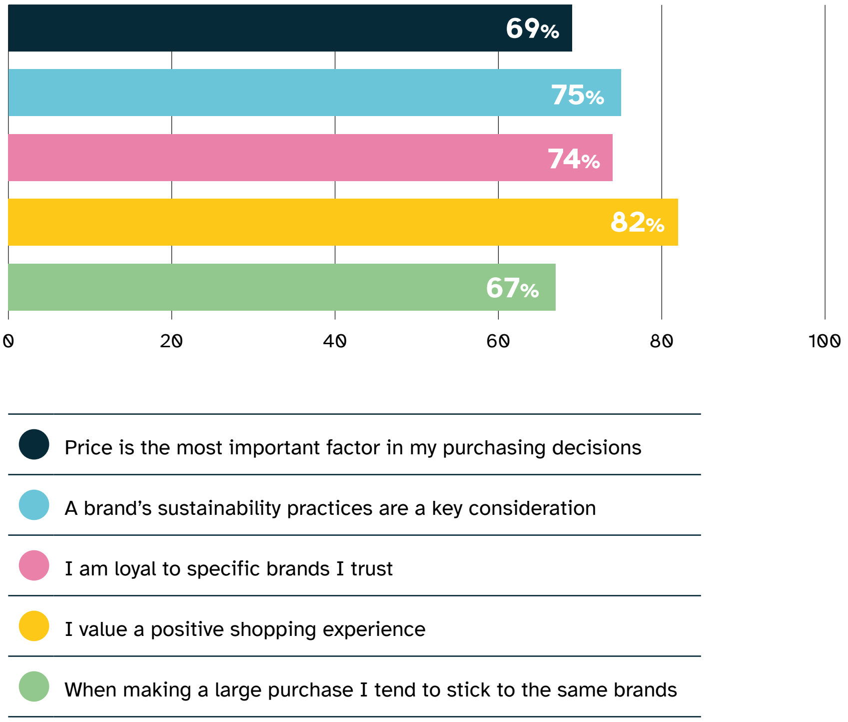
Do the following apply or not apply to you?



Importantly, brands should note there is a very strong correlation between brand loyalty and advanced sustainability behaviours. As you can see from Figure 11 on the next page, a higher proportion of those invested in advanced sustainability behaviours are more likely to be loyal to the specific brands they trust (74%) and consider a brand's sustainability practices as a key consideration (75%).

Figure 11

From the 'advanced sustainability behaviour' group, does the following apply or not apply to you?



Having a strong emotional investment in a brand's sustainability practices is driving sustainable consumption for Gen Zers, Millennials and high-value consumers. And that these groups' spending decisions are strongly based on their beliefs and value alignments with a brand. To put it simply, these consumers prioritise conviction over income.

Younger consumers are more active brand influencers and advocates

72%

Of Gen Z think they are influential in shaping the sustainability choices of others and 37% recommend sustainable brands to friends and family.

Younger, high-value consumers are more emotionally invested in those brands that resonate with their personal values.

They are significantly more active when it comes to engaging with these brands on social media and other channels. And they demonstrate a strong desire to advocate for brands they believe in, and to influence the sustainability choices of others.

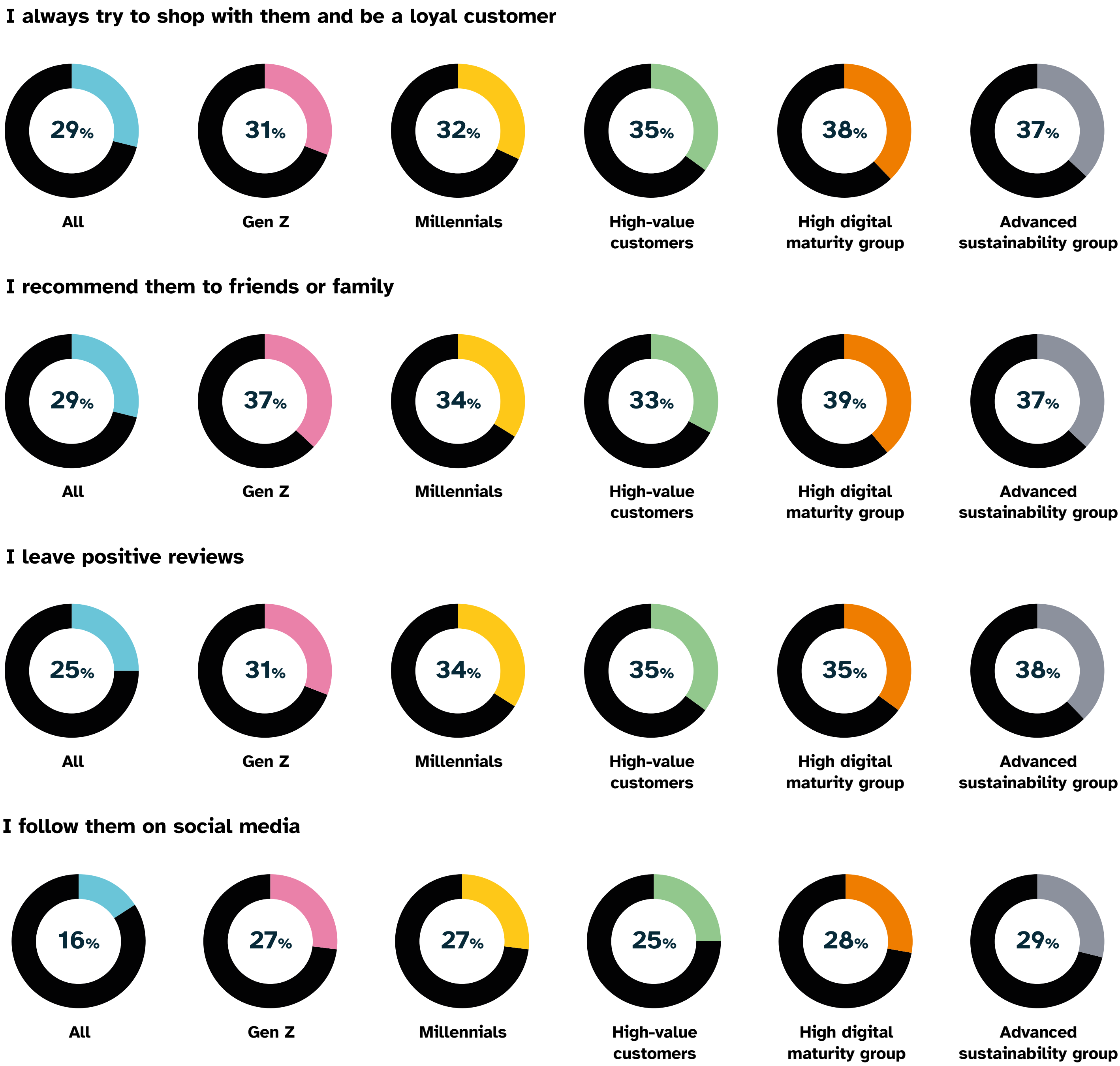
40% of Gen Z consumers and 37% of Millennials are significantly more active on social media and demonstrate a strong opportunity for influence and engagement. Plus, as you can see from Figure 12, younger generations

and high-value customers are more likely to be positive brand advocates for those brands that enable them to be more sustainable. They are more likely to shop with them, be loyal customers, leave positive reviews and follow brands on social media.

Nearly one in three (29%) of all respondents say that when brands enable them to be more sustainable, they always try to shop with them and be a loyal customer, and 29% would recommend them to friends or family. And this increases to 35% and 33%, respectively, for high-value customers and to 31% and 37% for Gen Zers.

Figure 12

When thinking about brands that enable you to be more sustainable (e.g., this could be packaging, labelling, demonstrating what they are doing), what impact, if any, does this have on you as a customer?

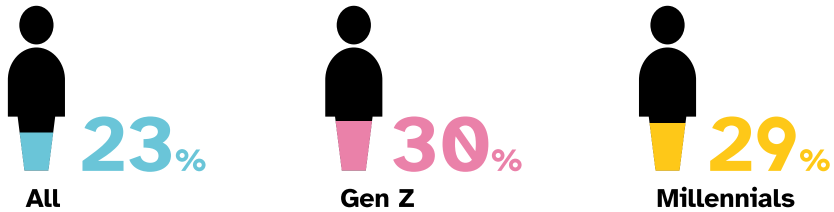


In addition to being significantly more active on social media and demonstrating a strong opportunity for influence and engagement, younger consumers are more likely to advocate for sustainable practices among their friends, family and social networks. They are more likely to encourage others to shop with sustainable brands and to share social media posts on how to make sustainable changes to lifestyle and shopping habits, as you can see from Figure 13 below.

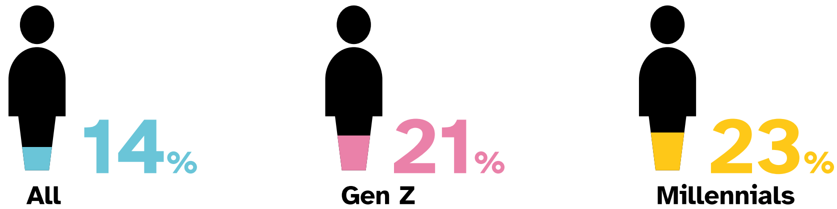
Figure 13

How, if at all, do you advocate for sustainable practices among your friends, family, and social networks?

Encourage them to shop with brands that I know have good sustainability practices



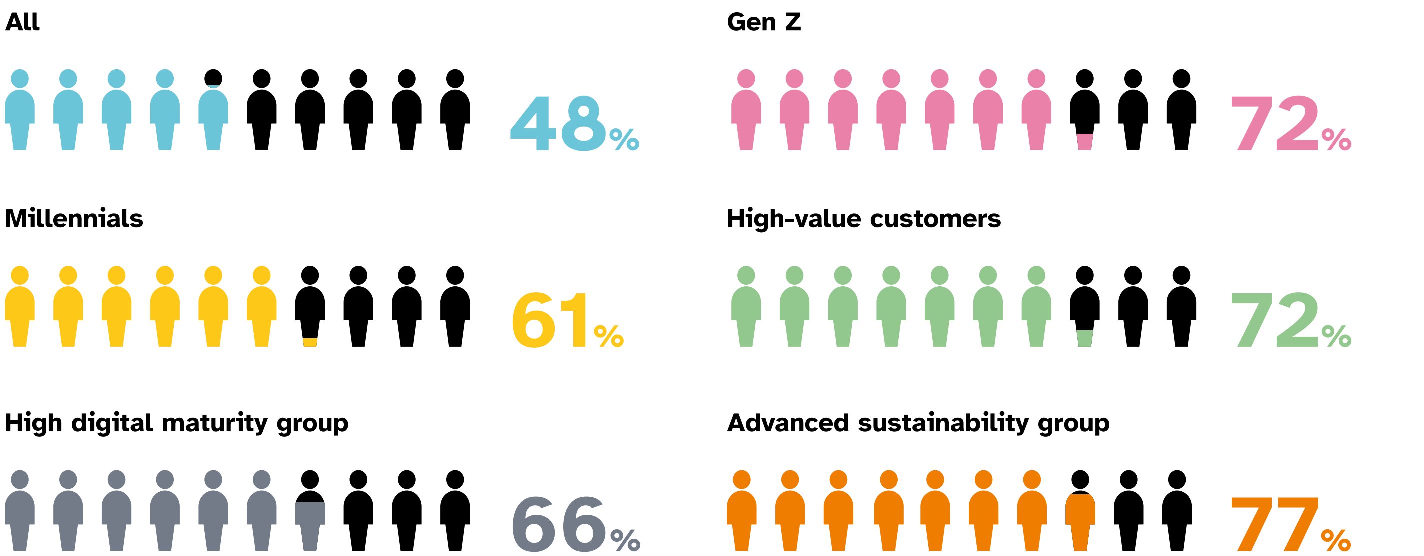
Share social media posts on how to make changes



Finally, while nearly half (48%) of consumers think they are influential in shaping the sustainability choices of others, this increases to 72% for Gen Zers and high-value customers, and 77% for advanced sustainability consumers, as you can see from Figure 14 below.

Figure 14

How influential, if at all, do you think you are in shaping the sustainability choices of others?



Why brands need to build a mission, not just a product

74%

Of advanced sustainability adopters value brands demonstrating long-term sustainability commitments.

Our research shows that brands need to be more transformative to drive sustainable growth.

And that demographic and behavioural shifts are redefining consumer beliefs – creating a window for transformation to drive this growth. Brands must go above and beyond simply following sustainability regulations and, instead, take a lead in transforming sustainability from a regulatory checkbox exercise into a powerful strategic differentiator.

Regulatory compliance is no longer a sufficient long-term strategy. The traditional sustainability landscape is fundamentally changing, creating new opportunities. Driven by a new generation of consumers demanding genuine, transformative action.

60%

Believe brands need to be transformative, not just compliant.

59%

Admire brands taking sustainability leadership.

29%

Consistently shop with sustainability-enabling brands.

To capitalise on this sustainable growth opportunity, brands need to build a mission, not just a product. And act as missional leaders, offering consumers transparent and authentic value systems and giving them the guidance and leadership they need and admire.

In the following section of this report, we outline 5 key steps that brands must take to capitalise on the market opportunity presented within the sustainable growth movement, to drive loyalty, advocacy and gain a long-term competitive advantage. These are:

STEP 01
Brands must think digital first

STEP 02
Seize new opportunities to drive loyalty and advocacy

STEP 03
Pursue new definitions of value

STEP 04
Take a systems and ecosystem design approach

STEP 05
Introduce new circular-economy driven product metrics

STEP 01
Brands must think digital first

Technology as the catalyst for driving sustainability

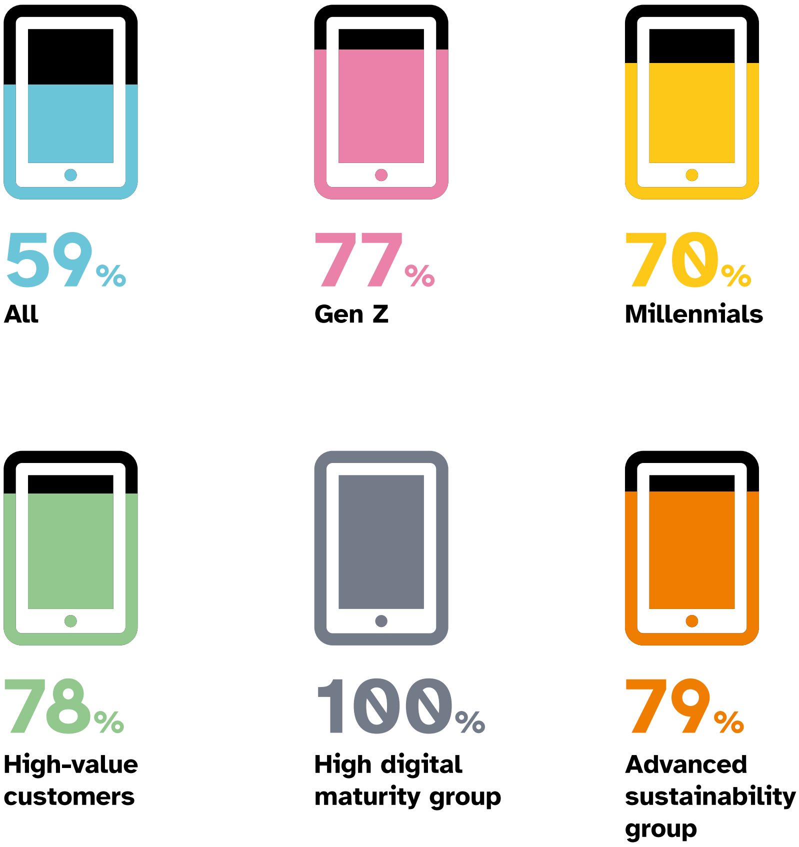
Our research shows that digital maturity amplifies sustainability engagement among British consumers. And that brands must think digital first and use technology as the catalyst for driving sustainability.

There is a clear opportunity for brands to leverage digital platforms for better sustainability education, advocacy, and transparency. And to capitalise on the fact that, for younger, digitally mature consumers, technology is enabling them to make more conscious choices.

We know that Gen Z and Millennial consumers live online. As you can see from Figure 15 below, 77% of Gen Z have interconnected digital ecosystems, increasing to 78% of high-value customers and 79% of advanced sustainability consumers. And with 95% of Gen Z and 94% of Millennials active on social media, these younger consumers want to share their sustainability advocacy online, influencing friends, family and peers.

Figure 15

All or most of my devices are connected to the internet and each other



Digital opens up a chance for brands to operate at a systems level, with connectedness baked into products, services and solutions. Those brands that successfully leverage technology to enable them to make meaningful sustainability choices that align with their identity and values will be best placed to gain their loyalty and trust.

STEP 02
Seize new opportunities to drive loyalty and advocacy

Brand leadership will drive sustainability

72%

Of Gen Z think they are influential in shaping the sustainability choices of others and 37% recommend sustainable brands to friends and family.

66%

Of Millennials and 76% of advanced sustainability consumers admire brands that take a leadership role in sustainability, going beyond regulatory requirements.

Transformative sustainability leadership secures high-value, loyal customers. Our research shows that sustainability-driven transformation provides brands with new opportunities to drive loyalty and advocacy.

Gen Z, Millennials and high-value consumers are passionate about brands that demonstrate a clear, transparent and long-term mission to do better when it comes to driving sustainability and positive environmental changes. And their spending is highly influenced by their beliefs and their desire to follow, advocate for and spend more on brands that enable them to remain sustainable.

Younger consumers want to shop with and support brands that are taking a leadership role in sustainability. And they like to share their passion for brands they believe in, both online and with friends, family and social networks.

72% of Gen Z think they are influential in shaping the sustainability choices of others. While 44% of all respondents, 57% of Millennials and 63% of high-value consumers say that they would engage with brands prioritising sustainability on social media.

STEP 03
Pursue new definitions of value

Brands need to create great customer experiences

Our research shows that for brands to capitalise on sustainability-driven transformation, they need to pursue new definitions of value and provide great customer experiences that differentiate them and provide a competitive advantage.

59%

Of all consumers and 67% of Millennials think it is important that brands are transparent about their sustainability practices and supply chains.

For example, 59% of all respondents and 67% of Millennials value and are more likely to shop with and support brands that are transparent about their sustainability practices and supply chains. While 53% of all respondents and 60% of Millennials are more likely to purchase products from brands that source materials ethically and sustainably.

Brands need to provide new customer experiences, and capitalise on digital experiences, that clearly demonstrate to their customers that they share these same values, ethics and a focus on transparency and integrity. And when it comes to product design, this often requires brands to detach their design thinking from existing assumptions.

To do this, brands need to step back to the essence of what they take to market and transform the way they deliver it. And often lots of things are set in stone which are normally out of reach of a design thinking process. For example, where previously the supply chain would be set in stone for a product and require product design based on this, brands now need to detach their thinking from those kinds of assumptions.

STEP 04
Take a systems and ecosystem design approach

Sustainable growth marks a profound change in how consumers value and interact with brands

Barriers to sustainable growth

1/3

Nearly 1/3 of Millennials struggle to find the time to be more sustainable.

Brands need to take a systems and ecosystem design approach, instead of a product level approach, to capitalise on sustainable growth.

A systems and ecosystem design approach enables brands to touch all the elements that ultimately define how sustainable something is, which would be out of reach at product level.

It also offers brands the ability to understand and address some of the many barriers and challenges that consumers face to adopting more sustainable behaviours.

For example, our research shows that over half (57%) of all consumers, 66% of Millennials and 74% of advanced sustainability consumers believe that sustainability-driven transformation offers brands a competitive advantage. Yet 41% of all respondents cite financial constraints and 19% cite time constraints as significant barriers to sustainable behaviours. And for younger and high-value consumers time constraints are an even bigger barrier, with 28% of Gen Z and high-value customers and 29% of Millennials saying that they struggle to find the time to be more sustainable.

Systems-level approaches allow brands to innovate around convenience, safety, and ecological impact, creating new value and competitive innovation. Plus, systems-level innovations can make sustainability more accessible and efficient, addressing some of these cost, time-constraint and other key barriers for consumers.

STEP 05
Introduce new circular-economy driven product metrics

Responsible, repairable, sustainable design and rethinking the entire product model

73%

Of all consumers value durability, repairability and longer lifespans from products, increasing to 76% among high-value customers.

Finally, our research shows that brands need to introduce new circular economy (CE) driven product metrics and design principals and plan the entire lifecycle of products.

73% of all consumers value durability, repairability and longer lifespans from products, increasing to 76% among high-value customers.

This transformative approach involves reimaging the way products are designed, used, and recycled, encouraging a shift away from the traditional 'make-use-dispose' model, to one that values longevity, reuse, and regeneration. And it represents a profound change in how we value and interact with the products we use, marking a significant step towards a more sustainable future.

This is not just an environmental strategy, but also a significant business opportunity, and brands must innovate solutions that deliver long-lasting value for consumers and the environment within the circular economy. The transition to circular design in product development is grounded in a holistic framework encompassing four key aspects of sustainable design: people, profit, planet, and purpose.

This framework sets the stage for the following key considerations:

Responsible design

This involves significantly reducing the material used in products, not just in quantity but also in terms of environmental impact. It also means rethinking products to minimise waste, such as creating biodegradable cutlery and moving back to more reusable approaches as an alternative to disposable plastic cutlery. Materials will continue to be chosen based on their carbon footprint and the energy consumed in their production and disposal.

Designing for repairability

Products should be designed for easy repair by consumers or technicians to extend product usable life. This includes using standard, easily removable fasteners, providing clear disassembly instructions, and incorporating modular design elements to facilitate part replacements and upgrades.

Using sustainable materials

Switching from single-use plastics to biodegradable materials is crucial. Additionally, using Post-consumer Recycled (PCR) and Post-industrial Recycled (PIR) plastics in product designs helps reduce the reliance on virgin materials and lowers the environmental footprint of products.

Rethinking the product model

This entails designing products with their end-of-life in mind. Can it be easily broken down into recyclable materials, biodegraded safely, or repurposed into something else entirely? Embracing models like reuse, refill, recycle, and remake present viable alternatives to the traditional approach of disposing of products in landfills or by incineration.

04 Research recap: key takeaways for brands

Why transformative sustainability is a fundamental business imperative for long-term growth and brand loyalty

The message is clear. The time for bold sustainability leadership is now.

Brands that go beyond regulations and take transformative actions will capture the loyalty and advocacy of younger, high-value consumers. This movement is not just about compliance - it's a new way of creating value, building trust, and securing commercial growth in a rapidly changing world.

To recap, and highlight the key findings and takeaways for brands from the Consumer sustainability report 2025:

01 British consumers are making changes to be more sustainable, and they admire and want to shop with brands that take a leadership role in sustainability.

02 Sustainability is no longer a compliance exercise and there is a new generation of consumers that want brands to lead with bold, transformative actions.

03 Brands must shift from reactive regulation-following to proactive step change innovation.

04 Competitive opportunity increases if brands innovate past the regulation goal posts.

05 Sustainability is now a critical business strategy, not just a corporate responsibility.

06 Consumers are asking for more guidance and leadership to help influence behaviours.

07 Sustainability leadership drives brand loyalty and positive advocacy.

08 Younger consumers are keen to advocate and will amplify a brand’s sustainability mission to their friends, family and social networks.

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