knit

Not Buying It: What Sustainability Claims Actually Influence Global Consumers?

How shoppers in nine countries define sustainability, which claims actually move them to buy, and what it takes to make a claim believable.



Sustainability claims are everywhere.

Some are more concrete, like “Made from 100% recycled materials,” “Made from 100% ocean plastic,” details about the benefits of bamboo-made products, and more.

Others, however, are more vague, if not outright misleading. It’s common to see products that claim to be BPA-free in places where BPA is already banned, or promises of “Climate-neutrality” and “Net-zero by 2030.” Hearing that something is made from 50% plant-based plastic sounds appealing until you learn it’s manufactured in a water-depleting, high-emission industrial process.

Some products just have a cute little picture of the earth with “Eco-friendly,” “Green,” “Sustainable,” “Kind to the planet,” “Certified B Corp,” or “All-natural” messaging that’s meant to make consumers believe they’re buying something good (or at least, not as harmful) without meaningful substantiation. Too many brands ask shoppers to accept something they can’t verify at the shelf.

This practice is known as greenwashing. Average consumers are increasingly catching on to brands that attempt it, so what are the sustainability claims that actually win them over? Most existing research focuses on whether people care about sustainability in general, but what specific messages or proof do they need to believe a brand?

To find out, we surveyed consumers in nine markets and asked them to define “sustainable” in their own words, rate more than a dozen specific claims, and explain what makes a claim feel genuine or like transparent marketing. We set out to answer five questions:

1. How do consumers define sustainability, and where does it rank among everything else they weigh when buying?
2. Which industries are held to the highest sustainability standards?
3. What language, evidence, and company behavior make a claim feel credible rather than performative?
4. Which claims most increase purchase likelihood, and why do they resonate?
5. How much extra will shoppers pay for the sustainable option?

One respondent described the problem more precisely than most marketers do:

> “What makes me skeptical is when they use vague terms without specific data or targets... Make claims without independent verification or credible evidence. Focus heavily on green imagery in messaging rather than measurable results.”
>
> — AI-moderated video respondent



About This Study

Knit surveyed adults aged 18 and older in nine countries in October of 2026, including the **United States, Japan, South Korea, Brazil, Spain, Germany, France, the UAE, and India.** Each market targeted about 150 respondents, and **146 to 175 completed the survey, for 1,423 total.** Within each market, about 30 respondents **(269 in total)** also answered AI-moderated video and audio questions embedded throughout the survey. Respondents answered in their own language (participants in India could use Hindi, English, or both).

Market	Survey language	Survey respondents	Video / audio respondents
United States	English	163	131
Japan	Japanese	162	23
South Korea	Korean	146	17
Brazil	Portuguese	155	33
Spain	Spanish	158	33
Germany	German	175	37
France	French	159	31
UAE	Arabic	151	30
India	Hindi, English	154	34

The survey itself had two parts. The first, the sustainability landscape, covered purchase priorities, sustainability mindset, industry expectations, and the evidence that makes claims credible. The second, claims testing, covered how clear each claim is, how much it changes purchase likelihood, which single claim matters most, which broad category of claim is most persuasive, and whether shoppers would pay 20% more for the sustainable option.

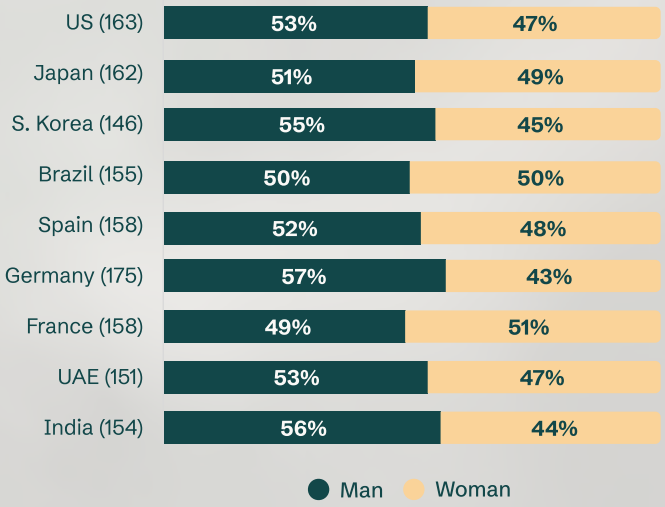
Quotas targeted an even split by gender and by age (18 to 34 versus 35 and older) in every market. Achieved samples are close to gender-balanced in most markets, while education varies meaningfully: Germany has a high vocational and technical share (41%), South Korea and the UAE a high college-degree share (60% and 62%), and India a high postgraduate share (49%).

How to read the numbers: Results are reported market by market, using each market's own answered base, and are not pooled into a global average. Differences described as significant were tested at the 95% confidence level. Scoring tendencies differ by country, so we treat gaps in absolute levels across markets, especially willingness to pay, as directional and put more weight on rankings within each market.

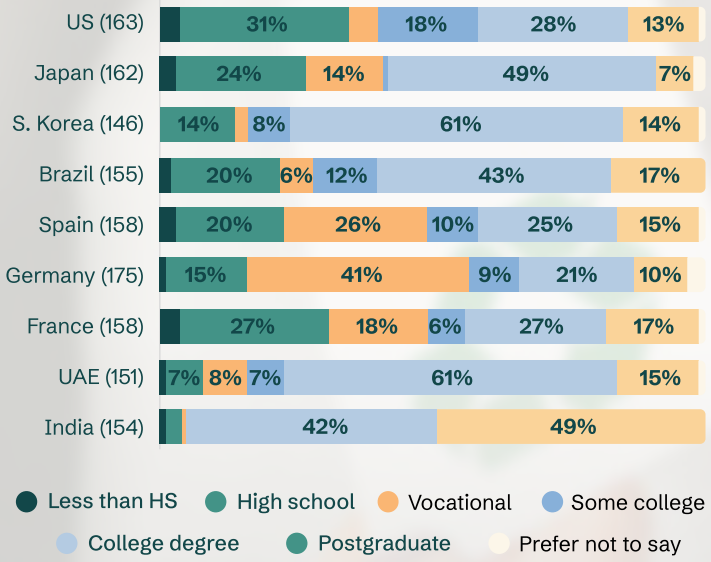
Respondent Demographics

Roughly balanced gender per market; education skews highest in India (postgraduate) and toward vocational training in Germany.

Gender by market (%; Spain also 1% non-binary / 1% self-describe)



Education by market (%)



Age. What is your current age? / Education. What is the highest level of education you have completed? / Gender. Which of the following best describes your gender identity?

Finding 1: Sustainability Is a Filter, Not the Reason to Buy

In eight of nine markets, shoppers rank environmental sustainability below price, fit, quality, reliability, and convenience when deciding what to buy. India is the only exception, where sustainability (95%) ranks alongside price, quality, and convenience.

The gap is clearest in the United States, where price (96%), fit with specific needs (95%), and overall quality (95%) all rate as important to far more shoppers than environmental sustainability (77%), which ranks last of the twelve factors tested. In Japan the distance is larger still: convenience, fit, and price are each important to 90% of shoppers, while sustainability is important to 52%. Even in the most sustainability-forward markets, functional needs set the context. In India, fit, ingredients or materials, and reliability each reach 97%, and in France quality leads at 96% while sustainability reaches 84%.

77% vs. 96%

(U.S. sustainability vs. price importance)

52% (Japan) vs. 95% (India)

on sustainability importance

Sustainability Ranked in Shopper Consideration

Sustainability rises in importance slightly in South Korea, Germany, France and India--but even there, functional needs remain most important.

Purchase consideration (% important)	US 163	JP 162	KR 146	BR 155	ES 158	DE 175	FR 158	UAE 151	IN 154
Price / affordability	96%	90%	97%	98%	89%	87%	94%	89%	95%
Meets my specific needs	95%	90%	91%	98%	97%	91%	93%	92%	97%
Overall product quality	95%	87%	95%	97%	94%	90%	96%	94%	95%
Reliability / performance over time	94%	84%	96%	99%	92%	91%	91%	91%	97%
Convenience / ease of purchasing	93%	90%	94%	97%	92%	88%	90%	91%	95%
Ingredients or materials used	91%	73%	92%	88%	86%	81%	83%	92%	97%
A brand I know and trust	87%	83%	89%	97%	89%	87%	90%	93%	93%
Reviews or recommendations from others	86%	57%	93%	88%	83%	69%	78%	91%	90%
Company's overall values and reputation	83%	67%	78%	92%	78%	79%	82%	87%	94%
Feels premium / high-end	81%	43%	70%	95%	79%	59%	76%	89%	90%
How ethically & socially responsible the company is	80%	52%	77%	93%	75%	74%	74%	88%	94%
How environmentally sustainable the product is	77%	52%	78%	88%	75%	74%	84%	88%	95%

Top 3 importance Bottom 3 importance

PurchaseImportance. In general, when deciding on products ti buy, how important is each of the following to you personally?

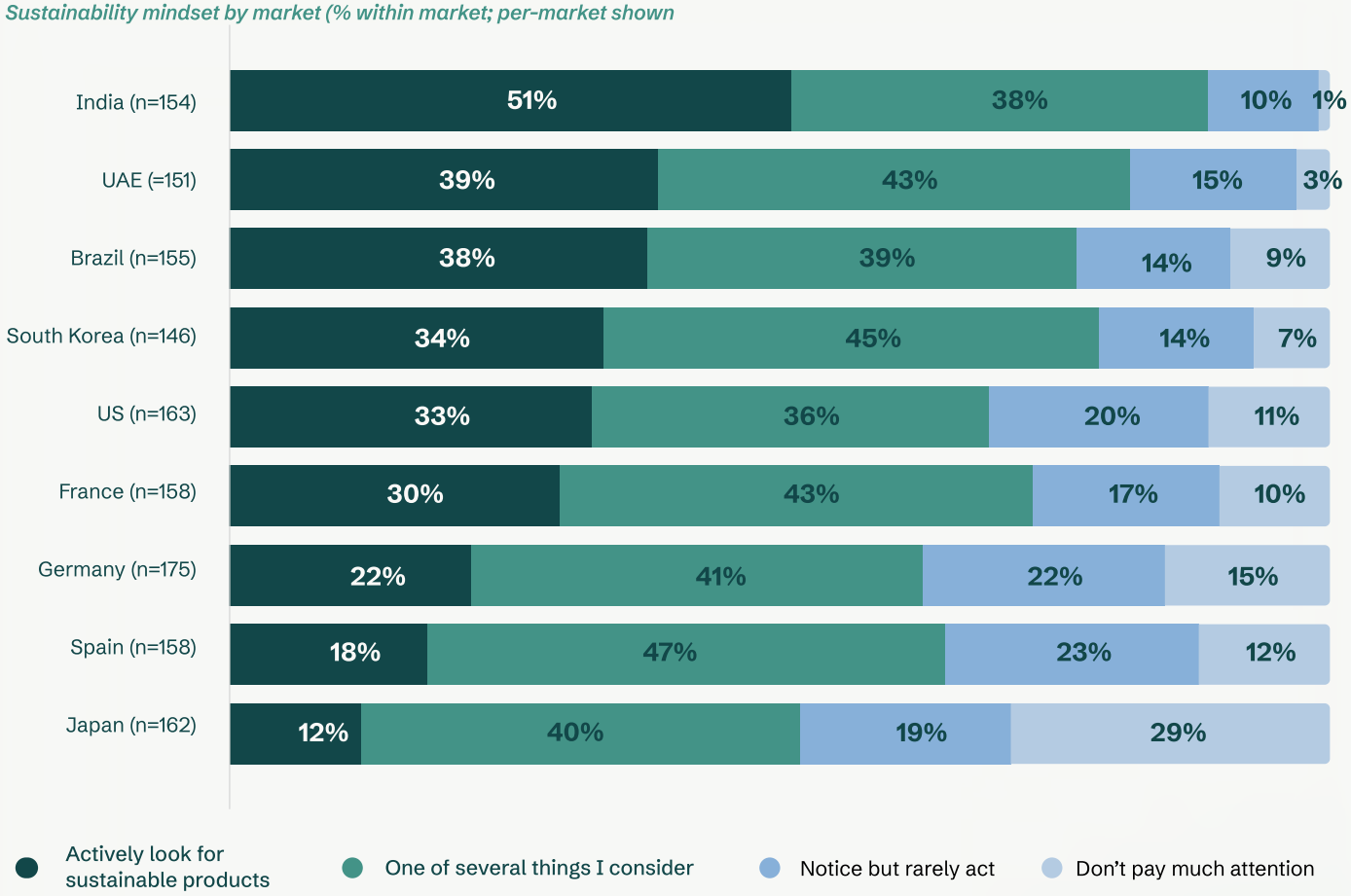
Mindset tells a similar story. In most markets, the largest or near-largest group says sustainability is "one of several things I consider": 37% in the United States, 40% in Japan, 45% in South Korea, 39% in Brazil, 47% in Spain, 41% in Germany, 42% in France, and 42% in the UAE.

Active seeking is the exception. Half of Indian shoppers (51%) say they actively look for more sustainable products or brands, and only 1% say they don't pay much attention. Japan is the mirror image: 12% are active seekers, and 29% don't pay much attention.

Sustainability Mindset by Market

A plurality in most markets say sustainability is one of several factors they weigh; active seeking is more prominent in India, the UAE and Brazil, while Japan shows the weakest engagement.

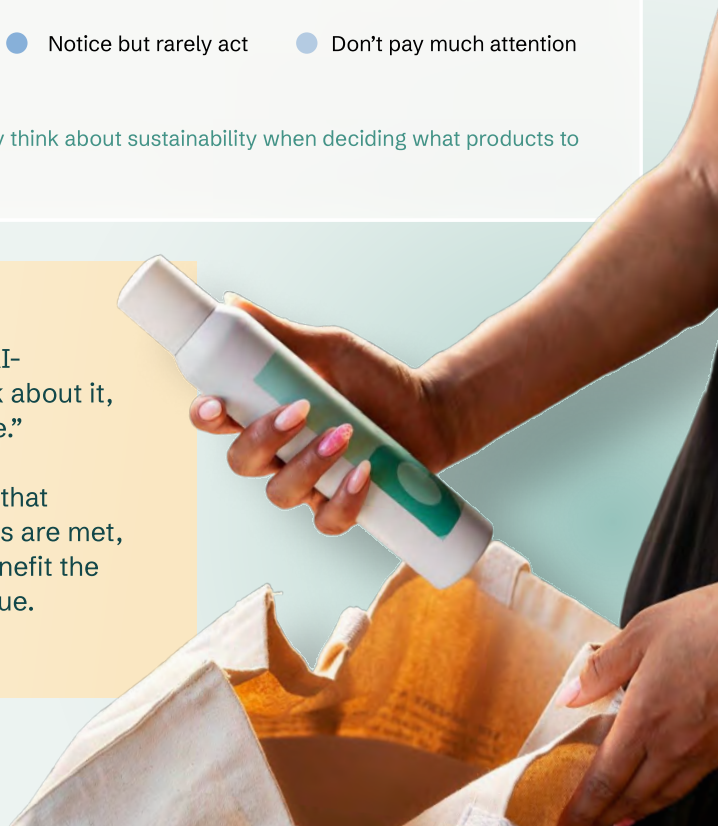
Sustainability mindset by market (% within market; per-market shown



SustainabilityMindset. Which of the following best describes how you typically think about sustainability when deciding what products to buy? Select the one that comes closest.

Sustainability simply isn't on some shoppers' radars. One AI-moderated video respondent even said, "I don't really think about it, so I really don't know what they would mean by sustainable."

The implication is not that sustainability doesn't matter; it's that sustainability works as a filter applied after functional needs are met, so it persuades most consumers when it's attached to a benefit the shopper already wants rather than offered as a distinct virtue.



Finding 2: All Markets Hold Food and Beverage to a High Bar

That said, shoppers don't hold every industry to the same sustainability standard. Food and beverage rank in the top three industries for sustainability expectations in all nine markets, and is first or tied in six of them:

Top 3 for food and beverage in 9 of 9 markets

95% (India) vs. 64% (Japan)

food and beverage expectation

- Japan **(64%)**
- Spain **(84%)**
- Germany **(78%)** tied with household and cleaning
- France **(92%)**
- The UAE **(90%)**
- India **(95%)** tied with consumer electronics

Where it's not first, it's close behind: second in South Korea (81%), and tied for third in the U.S. (82%) and Brazil (90%).

The energy and utility category leads in the U.S. (88%) and, alongside healthcare and pharma, in Brazil (92%). Consumer electronics and technology leads in South Korea (82%) and India (95%). At the other end, financial services and banking are ranked lowest in Japan (38%), Brazil (79%), Spain (64%), Germany (66%), and France (75%), and are at or near the bottom elsewhere.

Industry Sustainability Expectation Heatmap

Industry (% T2B expectation)	US 163	JP 162	KR 146	BR 155	ES 158	DE 175	FR 158	UAE 151	IN 154
Energy & utilities	88%	59%	80%	92%	80%	77%	86%	87%	93%
Household & cleaning	83%	54%	79%	88%	75%	78%	88%	84%	90%
Beauty & personal care	82%	40%	74%	87%	75%	76%	86%	85%	92%
Food & beverages	82%	64%	81%	90%	84%	78%	92%	90%	95%
Consumer electronics & tech	81%	61%	82%	88%	80%	71%	89%	87%	95%
Travel & transportation	81%	44%	71%	86%	80%	73%	82%	84%	92%
Clothing & apparel	80%	49%	67%	88%	73%	70%	85%	85%	89%
Healthcare & pharma	80%	54%	77%	92%	78%	77%	87%	88%	94%
Cars & automotive	77%	57%	76%	90%	80%	74%	88%	81%	90%
Financial services & banking	74%	38%	71%	79%	64%	66%	75%	82%	90%
Retailers & e-commerce	74%	46%	71%	90%	71%	67%	82%	82%	92%

ExpectationsIndustry. Thinking about companies across different industries, how much do you expect companies in each of the following industries to prioritize sustainability?

The pattern suggests that expectations are highest in categories shoppers already connect with their bodies, their homes, or shared resources: what they eat, the energy they use, the devices they own. It also shows how much the baseline varies by country. Japanese shoppers hold every industry to a lower standard than shoppers in India, Brazil, or the UAE, where more than three in four expect sustainability from nearly every industry listed.

For a food or beverage brand, that means sustainability claims will be both expected and scrutinized. A claim that earns attention in financial services may simply be table stakes on a grocery shelf.

Finding 3: Shoppers Define "Sustainable" Loosely, but Believe What They Can Inspect

When asked what it means when a company calls itself "sustainable," respondents usually reached for recycling and sustainable materials. Others pointed to animal welfare or a general sense of not taking more from the environment than what they **"give back."**

What was often missing, however, was specificity: many could say what sustainability sounds like but not what it would look like on a product.

> "It would just have to be something that maybe comes from recycled materials. But something that's not just taking from the environment, something that is being reused."
>
> "Using products that don't use animal testing and things like that, because they're good for and preserve the environment and it's also like very moral to not hurt animals."
>
> — AI-moderated video respondent



7 of 9 markets rank sourcing and production detail

#1 · 57% (India) and 55% (Brazil)
for sourcing transparency

37% (Japan) and 42% (South Korea)
lead with independent certification

This looseness is why proof matters so much. When we asked about what would most increase their confidence in a claim's credibility, shoppers didn't ask for bolder language: they asked for evidence they could check themselves. **Clear information about how a product is made or where its materials come from ranked first in seven of nine markets: India (57%), Brazil (55%), Spain (51%), the UAE (50%), the United States (44%), Germany (43%), and France (41%).** Independent certification and a consistent record of action over time round out a proof stack that appears in the top three in eight of nine markets for each of the three cues.

Japan and South Korea are the exceptions on what comes first. In both, **independent certification or verification** from a recognized organization leads (37% and 42%), which suggests shoppers there lean more on outside validation than on brand-supplied detail.

Top 3 Credibility Cues by Market

1	How it's made / where materials come from	44%	47%		55%	51%	43%	41%	50%	57%
2	Sustainability goals & progress	39%		39%						
3	Consistent action over time	35%	45%	41%	45%	41%	31%	27%		45%
4	Independent certification / verification		55%	42%	47%	41%	42%	39%	45%	46%
5	Customer reviews / recommendations							27%	43%	

ClaimTrust. Companies and brands can provide different types of information to support their sustainability claims. Which of the following, if any, would most increase your confidence that a claim is credible? Select up to three.

In their own words, respondents described the same three triggers across markets: traceable sourcing and production detail, recognized third-party certification, and a track record of sustainability action rather than one-off claims.

> "I believe a sustainability claim is genuine when it's backed by specific data, measurable goals, transparent reporting, and independent verification."
>
> United States respondent



> "I verified their information by checking third-party certifications like Fair Trade and B Corp databases and by reading independent environmental audit reports and investigative journalism articles rather than relying solely on the company's website."
>
> UAE respondent

> "Patagonia, I trust their claims because they are a certified B Corporation with a verifiable score... and clearly show independent supply chain certifications like Fair Trade and bluesign for their materials."
>
> India respondent

Shoppers also look beyond the label. One respondent said the strongest signal of a genuine claim is an inside look at how a company really works, which turns transparency itself into evidence:

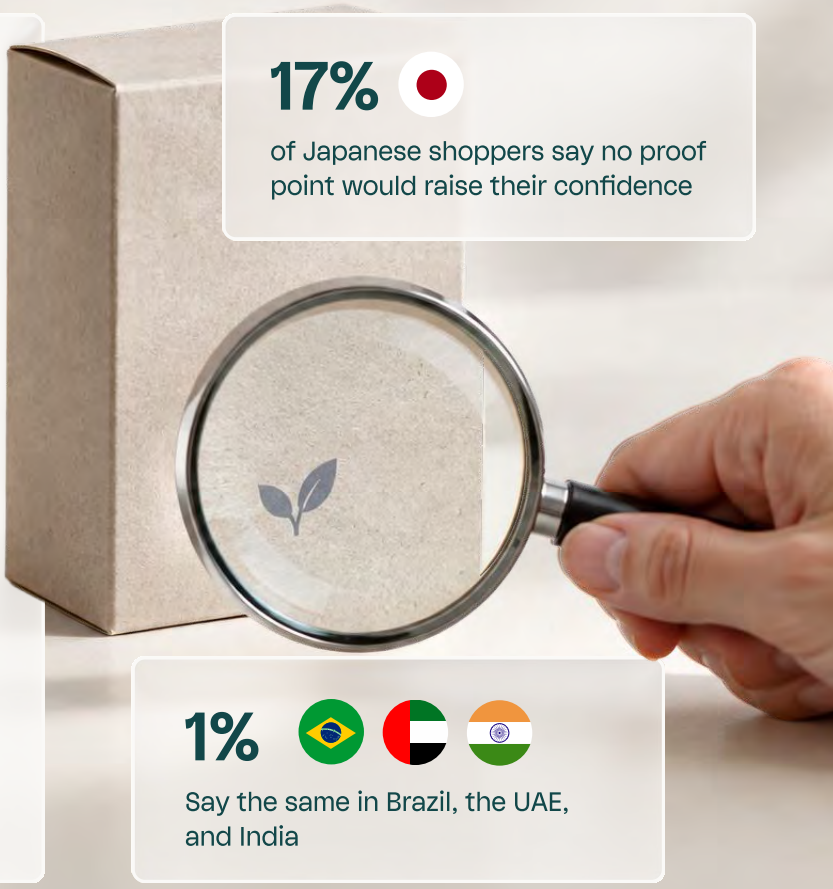
> "When I look at social media, and they give us insights into how the company works and how they're actually making an impact, you know, that to me really shows that they are genuine because they are not afraid to give us the inside look of how their company is operated."
>
> — AI-moderated video respondent

Finding 4: Skepticism Runs Deepest Where Proof is Hard to See

Shoppers in every market want evidence, but they differ on how much they believe is on offer.

When asked whether any of the proof points tested would raise their confidence in a claim, **17% of Japanese respondents said none would, followed by France (10%), Germany (8%), and the United States (7%). In Brazil, the UAE, and India, the figure is just 1%.** Japan is significantly higher than every other market except France, making it the toughest market for credibility and the one where a poorly supported claim has the least room to land.

When describing how they verify evidence, respondents described checking packaging, scanning codes, searching the web, consulting certification databases, and noticing whether a company acts consistently once a sustainability trend passes. **A theme of vague language triggering doubt appeared in 61 respondents' explanations of what makes a claim appealing.**



17%

of Japanese shoppers say no proof point would raise their confidence

1%

Say the same in Brazil, the UAE, and India



Proof has to be visible at the point of purchase. Respondents described trust built from things they can see and scan in the shopping moment.

> *"At Uniqlo, I think they have those collection boxes, and there's a QR code on them, so you can actually watch videos of the process of collecting and recycling the items. So I trust them."*
>
> — Japan



Precision. Respondents wanted exact percentages, measurable goals, and verifiable results rather than general claims.

> *"A brand that communicates clearly about its use of recycled materials and states precisely the share of recycled materials in its products."*
>
> — France



A default assumption that advertising may be misleading. In both markets, respondents explicitly distrusted unsupported brand claims, so brand-owned communication alone was not enough.

> *"Sustainability is a lie. It's something that companies that live off of it invent to deceive us."*
>
> — Spain



Shoppers check for themselves, and reward programs they can see working. Respondents described going online to test a company's claims, asking for real statistics, and trusting brands whose programs have visible, tangible outcomes.

> *"I usually search the internet to find out whether this company is telling the truth or not.*

> *"Boticário has a program where you take your product packaging to a collection point, and you get a discount on your next products."*
>
> — Brazil



Independent oversight and consistency. Respondents pointed to third-party checks, on-pack inspection, and brands that kept their line when sustainability was not fashionable.

> *"The company Frosch has taken this seriously for many, many years. It hasn't really deviated from its line just because something was briefly trending, but carries it through for all its products."*
>
> — Germany



> *"Supply chain traceability, if some credible brands actually publish this. They disclose their tier one through tier three factory locations, supplier codes of conduct, and raw material origins."*
>
> — UAE

The lesson for brands is that **skepticism is not an obstacle to overcome with louder messaging.** Across markets, shoppers described the same remedy: give people something they can check on their own.

Finding 5: Concrete Claims Beat Abstract Labels

We tested **14 specific** claims for clarity of meaning and for how much each would influence a participant's likelihood of buying a product. These claims were:

01	Carbon-neutral	08	Responsibly sourced
02	Net-zero emissions	09	Fair-trade certified
03	Made with 100% recycled materials	10	Made using 100% renewable energy
04	Plastic-free packaging	11	Water-saving / water-efficient
05	Biodegradable or compostable	12	Fair and ethical labor practices
06	Non-toxic/free from harmful chemicals	13	Certified sustainable
07	Locally sourced	14	Certified B Corp

A consistent pattern emerged: claims that describe something a shopper can picture, such as less plastic, renewable power, or saved water, outperform claims that name an abstract state or a credential (such as carbon-neutral, net-zero, or a certification body).

Resource claims work when they describe an action.

Made using 100% renewable energy and water-saving claims generally outperform carbon-neutral and net-zero on purchase impact. In India, renewable energy reaches 91%, compared with 84% for carbon-neutral and 82% for net-zero. The gap is wider in Brazil: 89% for renewable energy versus 72% for carbon-neutral and 70% for net-zero. In Spain, renewable energy leads carbon-neutral by 18 points (76% vs. 58%). Even in Japan, the market least responsive to every claim, renewable energy (42%) beat carbon-neutral (33%) and net-zero (34%).

Forced choice shows the same hierarchy: renewable energy is picked as the single most motivating claim by 5% to 14% of shoppers depending on the market, while carbon-neutral and net-zero stay at 1% to 7% in every market.



89% vs. 72%

(Brazil: renewable energy vs. carbon-neutral)



91% vs. 84%

(India: renewable energy vs. carbon-neutral)]

The Concrete Advantage: Renewable Energy vs. Carbon-Neutral

Gap in Positive Purchase Impact (%) between the most concrete and most abstract claims.
Base: respondents answering ClaimClarity (n=1422)



Materials and packaging claims are easy to visualize.

Claims of 100% recycled materials, plastic-free packaging, and biodegradable or compostable packaging are clear and persuasive in most markets, especially in India, Brazil, and the UAE. In India, impact reaches 90%, 89%, and 92% for the three claims.

Japan is consistently the lowest, at 46%, 41%, and 36%. In open-ended answers, respondents explained that these claims make waste reduction tangible in daily life. Across the audio explanations, 70 respondents described waste-reduction claims as feeling concrete, and 90 said resource and climate benefits increase a claim's appeal.



Credentials are better as reassurance than as a headline.

Certified B Corp is the lowest-ranked claim on both clarity and purchase impact in every market, from 22% impact in Japan and 31% in Germany to 76% in India.

Clarity is low as well: just 33% of Japanese and 34% of German respondents find it clear. Certified sustainable fares better, with impact at 89% in India, 88% in Brazil, 83% in the UAE, and 75% in South Korea, but it's weakest in Japan (40%). And as a single most motivating claim, certification language is rarely chosen: Certified B Corp is picked by only 1% to 4% of shoppers in any market.

Certified B Corp is the **lowest-ranked** claim in 9 of 9 markets



22% impact Japan vs. 76% India

Claim Clarity Heatmap

The clearest claims aren't necessarily motivating

Claim (% T2B clear)	US 163	JP 162	KR 146	BR 155	ES 158	DE 175	FR 158	UAE 151	IN 154
Water-saving / water-efficient	87%	62%	71%	92%	81%	77%	79%	95%	97%
Made with 100% recycled materials	82%	65%	86%	96%	85%	85%	90%	91%	95%
Plastic-free packaging	87%	69%	80%	92%	87%	86%	89%	97%	94%
Non-toxic / free from harmful chemicals	90%	61%	79%	88%	84%	77%	87%	95%	91%
Biodegradable or compostable	84%	51%	77%	91%	84%	86%	91%	94%	93%
Locally sourced	84%	70%	77%	84%	84%	78%	84%	91%	92%
Made using 100% renewable energy	83%	63%	78%	94%	78%	81%	80%	92%	95%
Certified sustainable	82%	51%	81%	92%	77%	79%	83%	89%	92%
Fair and ethical labor practices	83%	51%	63%	85%	70%	73%	79%	89%	92%
Responsibly sourced	80%	54%	65%	87%	68%	63%	75%	85%	90%
Fair-trade certified	75%	49%	79%	76%	70%	79%	73%	81%	92%
Carbon-neutral	69%	52%	79%	77%	58%	76%	70%	81%	90%
Net-zero emissions	72%	57%	61%	79%	68%	55%	61%	76%	90%
Certified B Corp	56%	33%	58%	61%	56%	34%	41%	70%	81%

Top 3 clarity Bottom 3 clarity.

ClaimClarity. How clear or unclear is the meaning of each of the following statements to you?



> “Using less water is really very important for me because I have seen many people in African countries and other third world countries where they walk for miles to get clean water.”
>
> “We’re not putting more pollution into the world, which means we’re not causing any more harm. And hopefully if everyone starts to make products like this we can start actually making the world a better place to live in.”

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— AI-moderated audio respondents

This does not mean certifications are worth dropping. Respondents themselves named third-party verifiers as the strongest proof of a claim (see Finding 3), but the point is order: lead with the concrete benefit, and let the certification stand behind it.

Finding 6: “Safe and Sourced” Travels Best, and Local Wins in Japan and Germany

If one claim territory travels across borders, it’s safety. Non-toxic or free from harmful chemicals is a top-three purchase motivator in all nine markets and the single-most motivating claim in seven, the first choice of 25% of shoppers in India, 23% in South Korea, 20% in Spain and the UAE, 19% in the United States, 17% in France, and 15% in Brazil.

It’s also among the clearest claims tested: 95% of respondents in the UAE, 91% in India, and 90% in the United States say they understand what it means.

Non-toxic is a top-3 motivator in 9 of 9 markets · **The #1 single most motivating claim in 7 of 9**

25% in India, 23% in South Korea

The broader category tells the same story. When asked which type of sustainability information is most likely to influence shoppers, claims about safer or responsibly sourced products came first in six of nine markets, including 37% in the UAE, 35% in Japan, 33% in India, 29% in the United States, and 28% in Brazil.

Most Motivating Claims by Market

Top overall motivators = claims that increase purchase likelihood when shoppers can endorse multiple options. Single Most Influential Claim = the one claim selected as most motivating.

1	Non-toxic / free from harmful chemicals	77%	57%	82%	87% *Water-saving also 87%.*	84%	68%	76%	88%	92%
2	Locally sourced	71%	60%			75% *Water-saving also 75%.*				
3	Responsibly sourced	71%							88%	
4	Made using 100% renewable energy		46%	71%	89%	76%		76%		
5	Certified sustainable			75%	88%			76%		
6	Plastic-free packaging						68%		84%	
7	Fair and ethical labor practices						68%			
8	Biodegradable or compostable									92%
9	Water-saving / water-efficient									93%
	Single Most Influential Claim	19%	20%	23%	15%	20%	14%	17%	20%	25%

Top Overall Motivators #1 #2 #3

IncreaseMost. Which ONE of the following statements would most increase your likelihood of buying a product? ClaimsImpact. Claims rated as increasing likelihood of buying a product.

Claims With Most Positive Impact on Shoppers

Claim category	US 163	JP 162	KR 146	BR 155	ES 158	DE 175	FR 158	UAE 151	IN 154
Safer/Responsibly sourced	29%	35%	27%	28%	27%	21%	23%	37%	33%
Sustainable Materials/Packaging	22%	12%	31%	23%	10%	22%	18%	20%	23%
Reducing environmental impact	14%	10%	13%	23%	29%	19%	21%	17%	19%
Independent certification	12%	12%	17%	10%	11%	13%	13%	17%	14%
Ethical practices	13%	10%	8%	13%	18%	14%	16%	7%	11%
None	10%	20%	5%	3%	6%	10%	8%	2%	1%

Highest claim category Lowest claim category

ClaimCategory. Thinking more broadly about the sustainability information you might see when shopping, which types of claims are most likely to positively influence your purchase decision? Select one.

Personal safety was one of the most common reasons shoppers provided for choosing a claim in open-ended audio answers. 66 respondents said it made sustainability immediately relevant to them, and 53 specifically named non-toxic or chemical-free products. This messaging likely works because it translates a general environmental benefit into a personal one.





Local sourcing is the notable exception

In Japan, locally sourced is the clearest claim tested (70%), the highest-impact claim (60%), and the single most motivating claim (20%). In Germany, where no one claim dominates, it is also the top forced-choice pick (14%). Spain and France show meaningful pull as well (16% each), while it barely registers as a first choice in India, South Korea, and the UAE (3% each) or Brazil (1%). Respondents who chose it described a sense of trust and community value that global claims rarely carry (24 respondents).

Responsibly sourced works only when explained

This claim is the least clear of the three health and sourcing claims in most markets, and only 54% of Japanese respondents say they understand it ("responsible" would need a plain-language explanation). That said, it's powerful in places where it's understood: impact reaches 88% in the UAE and 86% in Brazil.



Fairness works when it's concrete

Fair and ethical labor practices are rarely the strongest claim in any market, but respondents who chose it spoke with conviction and described it in terms of wages, hours, and worker treatment rather than abstract ethics (35 respondents).

> "Fair labor means a lot to me because I've worked in many places that I felt weren't fair labor."
>
> — AI-moderated audio respondents

> "I think it means to pay them fairly and give them fair wages and fair hours and not switch up their hours."
>
> — AI-moderated audio respondents

Germany shows what a market without a dominant claim looks like. Plastic-free packaging, non-toxic, and fair and ethical labor practices are tied at 68% for purchase impact, and no single claim breaks away. For brands there, a portfolio of concrete claims may work better than one hero message.

Finding 7: The Premium Is a Market-Specific Opportunity

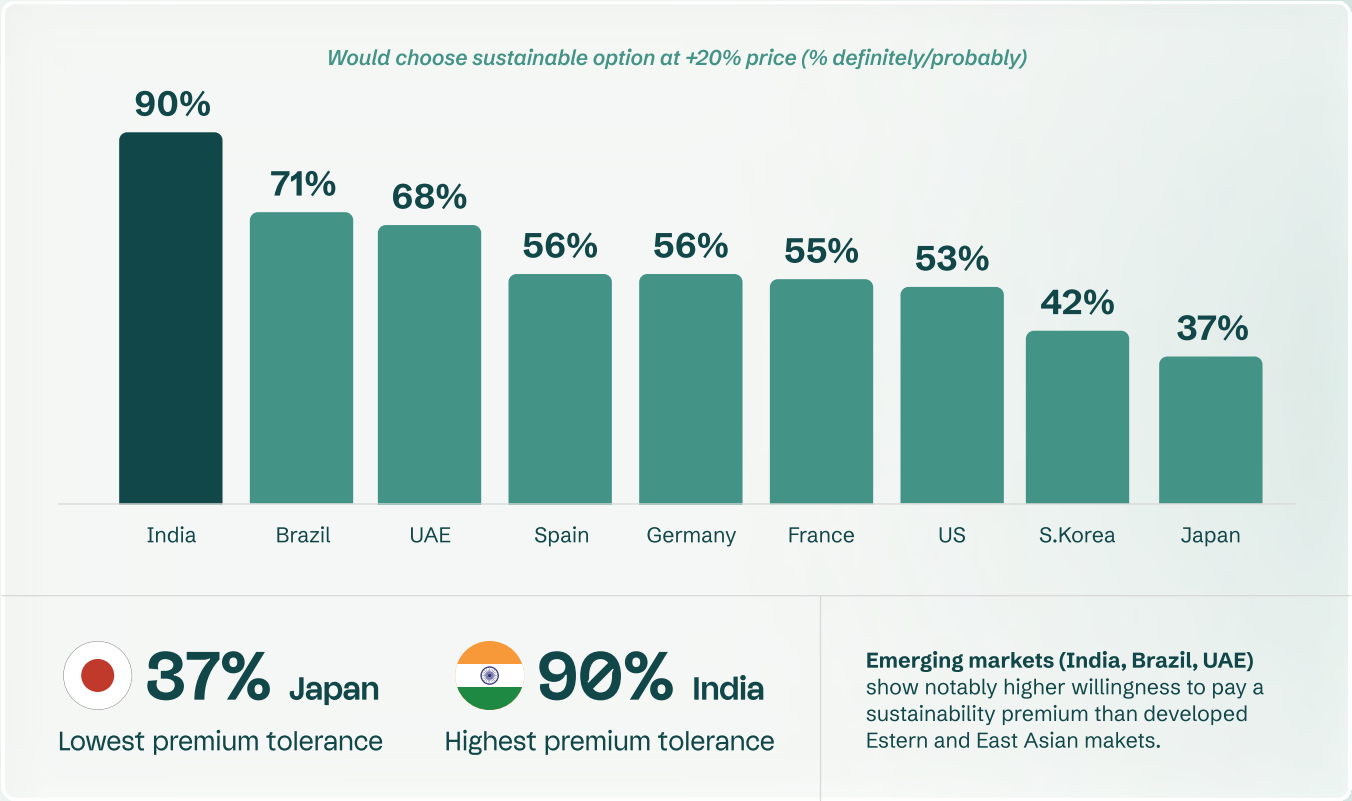
Willingness to pay 20% more for a sustainable product option ranges significantly between markets.

90%	71%	68%	56%	56%	55%	53%	42%	37%

90% in India *vs.* **37%** in Japan | **71%** Brazil | **68%** UAE



Willingness to Pay a Premium by Market



37% Japan
Lowest premium tolerance

90% India
Highest premium tolerance

Emerging markets (India, Brazil, UAE) show notably higher willingness to pay a sustainability premium than developed Estern and East Asian makets.

Premium sustainability positioning is viable mainly in India, Brazil and the UAE.

These tiers align with what we've seen elsewhere. The markets where shoppers say they will pay more are the same ones where sustainability matters most as a purchase consideration, where more claims increase purchase likelihood, and where shoppers are least likely to dismiss proof points.

Japan sits at the other end on each measure: lowest premium tolerance, the weakest claim impact, and the largest share of shoppers (17%) saying no proof point would raise their confidence.

Age is also a weaker signal than geography. **Adults 18 to 34 in the U.S. were directionally more likely than those 35 and older to say they "definitely would" pay the premium (35% vs. 25%),** but the difference wasn't significant. The only significant age difference was that older shoppers were more likely to say they **"might or might not" (35% vs. 20%),** which suggests ambivalence rather than opposition.

Note: These figures describe stated intent, not behavior at the shelf, and scoring tendencies differ by country, so it's important to read them as directional.

The practical takeaway is to treat premium positioning as a market-level decision. India, Brazil, and the UAE are the strongest candidates for premium sustainable propositions. In the United States, Spain, Germany, and France, the premium has to be justified by quality, safety, ingredients, or packaging benefits. In Japan and South Korea, usefulness and credibility should come before any premium ask.

Starting Points by Market

No single global claim system fits all nine markets. The table below combines the three inputs that matter for each: the claim shoppers understand and respond to most, the claim they pick first when forced to choose, and the proof that best reduces skepticism. Treat it as a starting hypothesis for creative and packaging tests, not a final answer.

Market	Strongest claim (clear / impact)	Most-chosen single claim	Proof to pair with it	Would pay 20% more
United States	**Non-toxic** (90% / 77%)	**Non-toxic** (19%)	**Sourcing and production detail** (44%)	53%
Japan	**Locally sourced** (70% / 60%)	**Locally sourced** (20%)	**Independent certification** (37%)	37%
South Korea	**Non-toxic** (79% / 82%)	**Non-toxic** (23%)	**Independent certification** (42%)	42%
Brazil	**Renewable energy** (94% / 89%)	**Non-toxic** (15%)	**Sourcing and production detail** (55%)	71%
Spain	**Non-toxic** (84% / 84%)	**Non-toxic** (20%)	**Sourcing and production detail** (51%)	56%
Germany	**A portfolio** plastic-free, non-toxic, and fair labor tie at 68% impact	**Locally sourced** (14%)	**Sourcing and production detail** (43%)	56%
France	**Recycled materials and non-toxic,** both about three in four on impact	**Non-toxic** (17%)	**Sourcing and production detail** (41%)	55%
UAE	**Non-toxic** (95% / 88%), with responsibly sourced also at 88% impact	**Non-toxic** (20%)	**Sourcing and production detail** (50%), plus reviews (43%)	68%
India	**Water-saving** (97% / 93%)	**Non-toxic** (25%)	**Sourcing and production detail** (57%)	90%

What This Means for Brands

Though no single claim system applies broadly, our findings do point in a unified direction for brands: make sustainability tangible, make it checkable, and localize it. Here's our advice for doing so in practice.

Attach sustainability to a benefit shoppers already want

Sustainability ranks below price, fit, quality, reliability, and convenience in eight of nine markets. It's rarely the reason to buy, but it can be the reason to choose between two good options. Frame it as a product benefit first, and an environmental one second.

Treat proof as part of the claim, not a footnote

Shoppers believe what they can inspect. The minimum proof stack in most markets is clear sourcing or production detail, independent certification or verification, and evidence of consistent action over time. Lead with traceable sourcing in the United States, Brazil, Spain, Germany, France, the UAE, and India, and lead with third-party validation in Japan and South Korea.

Lead with safer-product and transparent-sourcing language, then localize the hero claim

Non-toxic is a top-three motivator in all nine markets and the most motivating claim in seven. Use it as the default starting point, then adjust: lead with locally sourced in Japan, renewable energy in Brazil, a portfolio of concrete claims in Germany, and a pairing of water-saving and non-toxic in India.



Put the proof where the decision happens

Respondents trusted what they could check in the moment: a QR code that shows the recycling process, a precise percentage of recycled content on the pack, a collection point that gives you a discount. Make verification something a shopper can do in seconds, on the product or in the aisle.

Translate abstract labels into plain-language outcomes

Certified B Corp is the lowest-ranked claim in every market, and carbon-neutral and net-zero trail more concrete resource claims. These labels still carry credibility when explained, so pair each with a definition, a metric, the certifying body, or progress data, and let them support a concrete benefit rather than lead the message.

Expect more scrutiny in food and beverage

Food and beverage sits in the top three of expectations in every market. Consumers both expect and examine claims in this category, so they need stronger proof than in categories where sustainability is a pleasant surprise.

Tier market investment by premium readiness

Prioritize premium sustainable propositions in India, Brazil, and the UAE. In the United States, Spain, Germany, and France, justify the premium with quality, safety, ingredients, or packaging benefits. In Japan and South Korea, lead with credibility and usefulness before testing a premium ask, and validate stated willingness to pay with shelf-level testing before committing.

Build the story around specificity

The strongest creative and packaging tests will combine four things for each market, including a claim shoppers understand, the claim that most motivates purchase, the proof cue that makes it believable, and a benefit that matters to them personally.



Conclusion

Shoppers care about sustainability, but they've stopped taking claims at face value. Across nine markets and nine languages, the claims that earn belief and purchase are specific, personally relevant, and backed by evidence a shopper can check. The ones that fall flat ask for trust without offering a way to verify it.

The brands that win will make sustainability visible, concrete, and local: a claim shoppers can picture, proof they can inspect, and a message tuned to what each market already values. The goal is to move shoppers from **"this brand says it's sustainable"** to **"I can see why I should believe it."**

> *"The strongest indicator of genuine sustainability claims is independent accredited third-party verification rather than self-created green patches or generic promotional terms."*
>
> — AI-moderated video respondent



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