

Selling Sustainability

*How innovators in beauty
—and beyond—can make
green the new black*

A consumer insights report by

Highlight.

The data on consumer preferences for sustainability is clear

This is the second year Highlight has conducted a survey of consumer preferences for sustainability in product development.

A lot has changed in a year. Since we last asked members of our community to weigh in, we've had a presidential election, historic wildfires across the country, a record-breaking hurricane season and more.

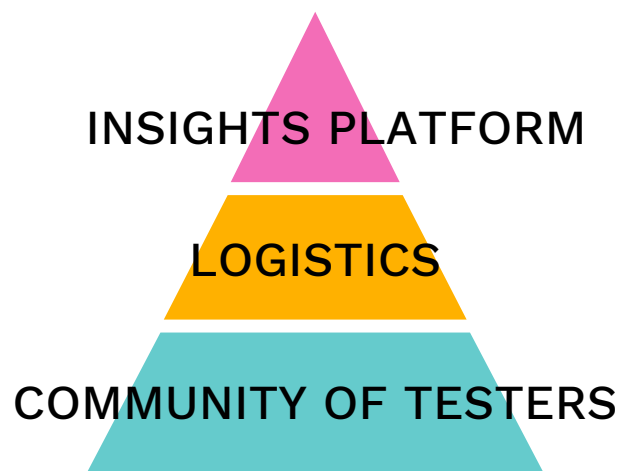
With all that's evolved, it's a privilege to be able to cut through the noise of headlines and see what stories the data is telling us. One thing is clear from the jump: consumers care more and more about making sustainable purchase decisions.

Highlight's product testing solution integrates:

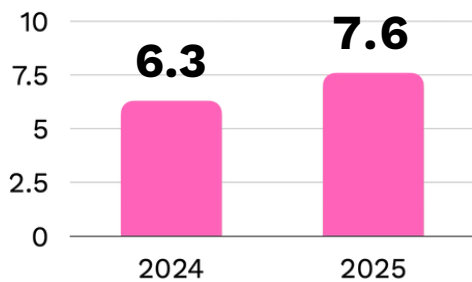
About the study

Highlight is a three-part physical product testing solution: an owned community of nationwide testers, a logistics and shipping solution, and an [insights platform](#) that delivers consumer and sensory data in real time.

For this trend report, Highlight polled our proprietary audience in March 2025 with a 14-question survey to gather both quantitative and qualitative data on preferences for sustainable products, especially in the beauty industry. In total, 2,598 respondents from across the country completed the survey.

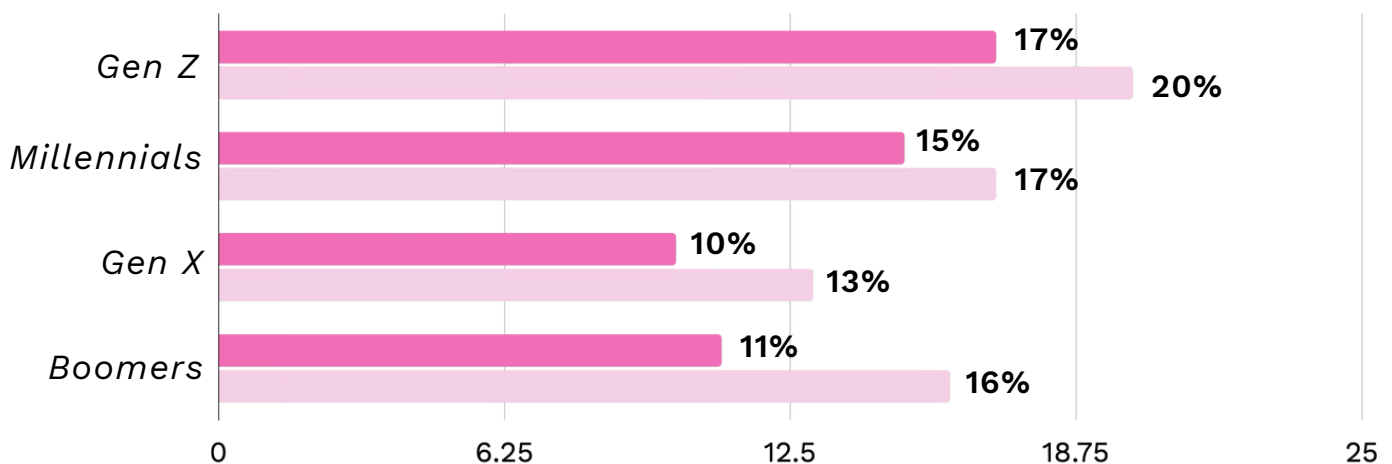
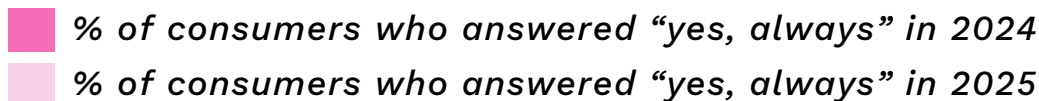


More and more shoppers seek out sustainable products



The first set of survey questions focused on purchases across categories. When asked “How important is sustainability to you when purchasing products overall (across all categories)?” on a scale of 1 (not at all) to 10 (very important),

respondent answers increased by more than a whole point year-over-year. When asked “Do you actively seek out and purchase products that are labeled or marketed as sustainable or eco-friendly?” the most common answer was “Sometimes, depending on the product” (73%). When we slice year-over-year data by generation, the story becomes a little more interesting.



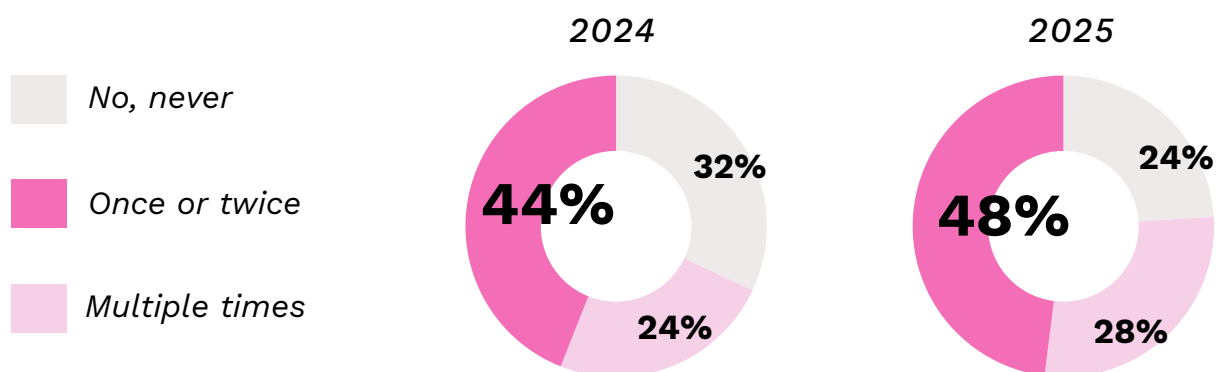
While still less than a quarter of consumers overall say they always seek out sustainable products, we can see the numbers moving up in all cohorts year-over-year. We can also see a continuing trend of **Gen X** consumers being the **least likely** to answer that they always seek out sustainable products when shopping.

Consumers will make sacrifices for sustainability

In subsequent responses, support for sustainable purchasing habits grew even more sharply across all age groups—even when it required giving up familiar products or brands.

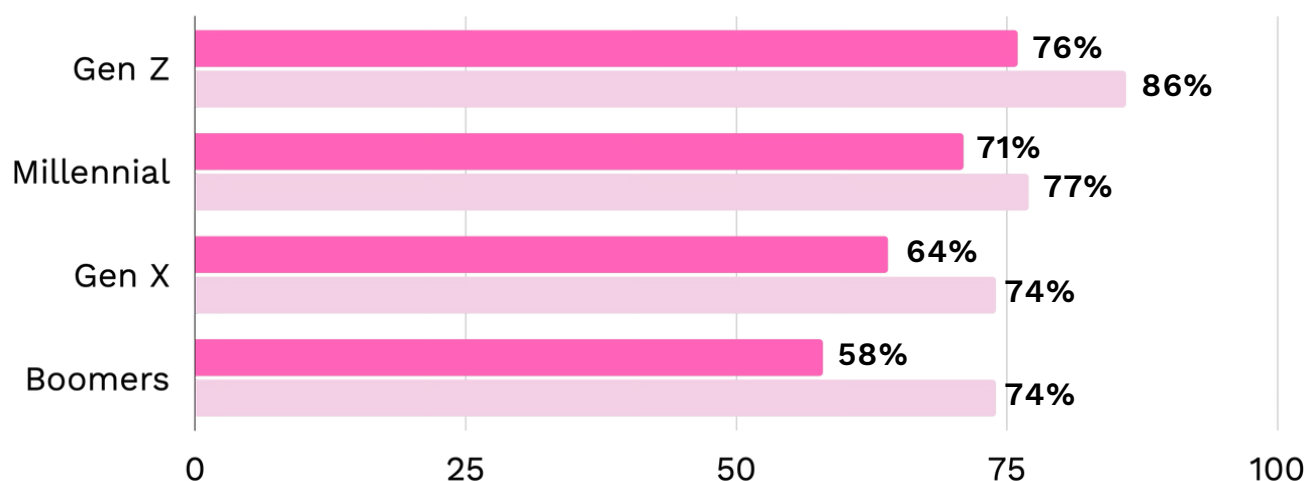
Have you ever switched brands or stopped purchasing a product due to sustainability concerns?

Overall results:



Results by generation:

■ % that answered “Once or twice” and “Multiple times” in 2024
■ % that answered “Once or twice” and “Multiple times” in 2025

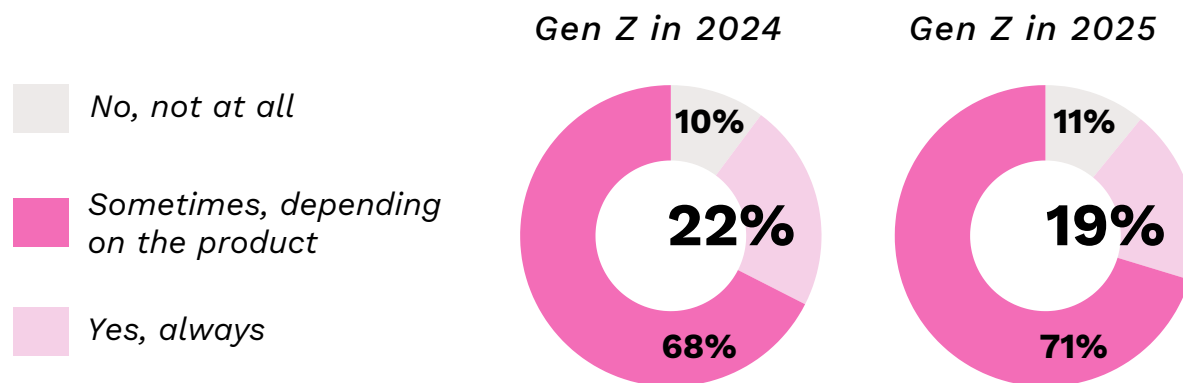


But consumers—especially Gen Z—may simply expect better

The only question for which responses in favor of sustainable purchase habits showed any signs of decreasing was when it came to price sensitivity. When we asked if consumers would be willing to pay more for products that are environmentally friendly or sustainable, those who answered “Yes, always” **increased to 16% from 13% in 2024**.

This reflects a modest increase across all generations—except Gen Z. For Gen Z, those who replied “Yes, always” actually **dropped from 22% in 2024 to 19%**, which could reflect a less positive economic outlook.

Do you pay more for products that are environmentally friendly or sustainable?



This could reflect an increasingly prevalent expectation among younger consumer groups. Our open-ended responses demonstrated it, and Taylor Anderson from Palmolive spoke to it last year:



*“Sustainability in and of itself is no longer a differentiator, **it’s just an expectation** that it’s woven into how businesses operate.”*

- Taylor Anderson, Senior Director of Global Insights Capabilities at Colgate-Palmolive

For more Gen Z consumers, sustainability is just table stakes

Highlight.

Open-ended responses from Gen Z Highlighters

"I just hope that we improve our products and that every product will be sustainable at one point."

27, AL, she/her

"I think all brands should be sustainable. We should be making sure the earth and people are safe."

24, IL, they/them

"It is so important to practice sustainability throughout its supply chain. There's packaging, delivery, formula creation, and so much more that can be ethical and sustainable."

23, CA, she/her

"I think companies should already be aware of their damages to the earth instead of leaving it upon the consumers."

26, OK, she/her

"It's hard to determine whether the brands actually make an impact, and I think greenwashing is an excuse to raise prices."

27, AR, she/her

"Beauty should not come at the expense of cruelty and environmental harm."

27, CA, she/her

"I feel we are definitely headed in the right direction but it takes both consumers and brands working together. Pricing needs to be better, especially with the economy right now."

25, TX, he/him

"I buy beauty products at least once a month and they tend to be a bit on the pricier side, so I want to ensure I buy ethical products."

27, CA, they/them

"Continued advancements in certification standards and life cycle analysis will be crucial for ensuring that sustainability claims are both robust and verifiable, thereby enabling informed decisions that support both human and environmental health."

24, AR, he/him

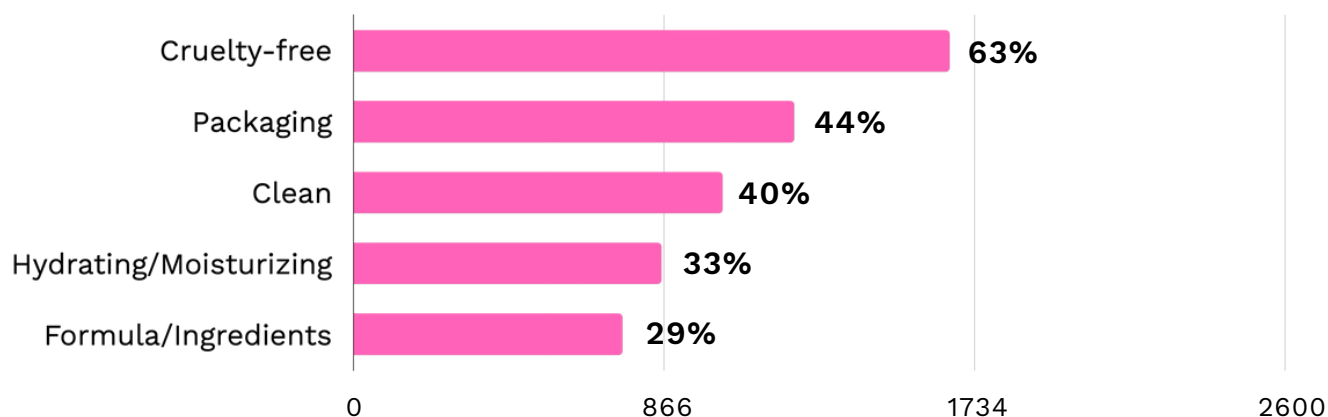
Beauty brands are held to the same standards

When we asked respondents, “How important is sustainability to you when purchasing beauty products?” the average answer remained the same as for any product: **7.6** (on a scale of 1-10).

Then we dug into more beauty category specifics...

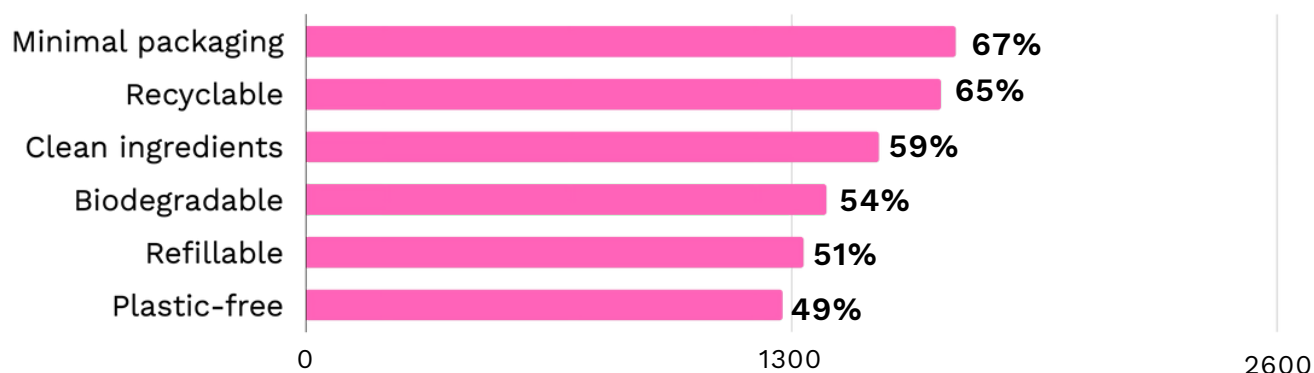
What marketing claims are most important to you when purchasing beauty products?

When we asked this question for our survey last year, “Animal impact” was the most popular answer (for all categories), with little variation across age groups. 2025 shows similar results with the popularity of “Cruelty-free”:



As in other categories, consumers are hyper-focused on packaging (See: Highlight’s report with The Goods Mart), while attributes like “locally sourced,” “organic,” and “concentrated formula” scored lowest:

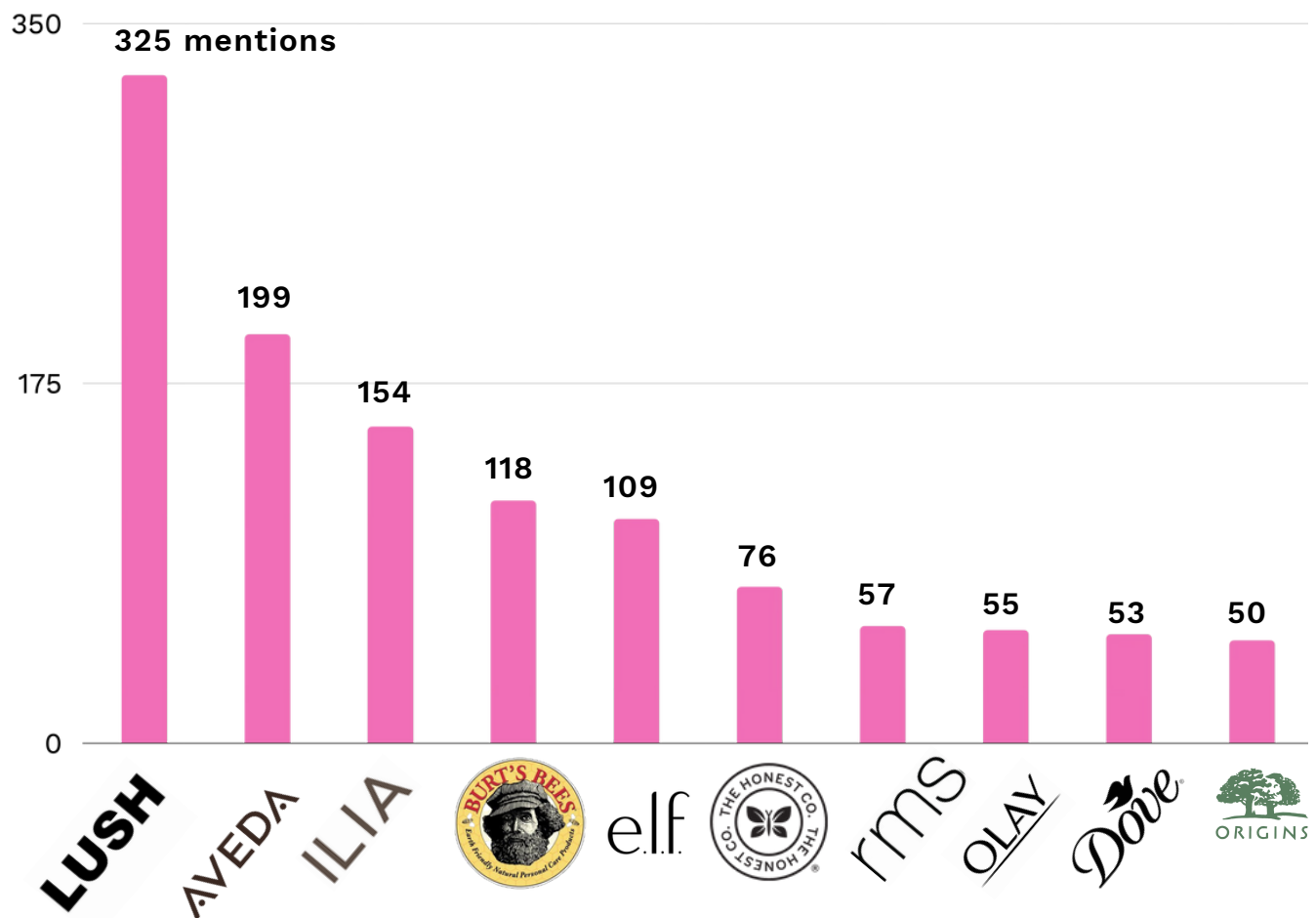
What attributes indicate that a beauty product is more sustainable?



The most sustainable beauty brands, according to consumers

In an open-ended question, we gave respondents the opportunity to tell us which beauty brands they think of as the most sustainable.

What beauty brands do you think are the most sustainable?



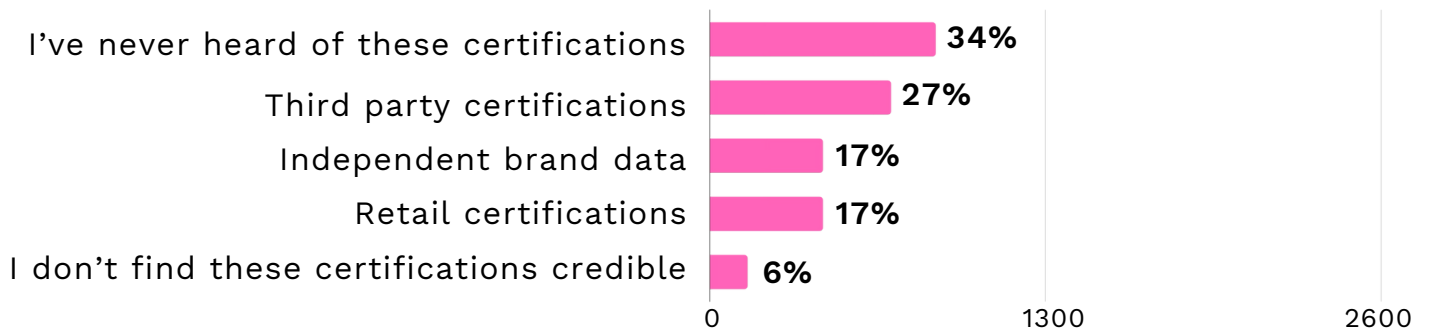
Did you know?

Lush is well-known for taking a stand on issues they feel are important, like sustainability. In 2021, they removed their brand from Instagram, Facebook, TikTok, and Snapchat in protest of the harm some studies have shown social media can have, especially for younger users.

The most trustworthy beauty certifications, according to consumers

One key way brands across categories signal their sustainability credentials to consumers is through the use of certifications they can display on pack, in store, or on ecommerce properties.

What certifications indicate a sustainable product?



Third party certifications

Cradle to Cradle
RePurpose Global
Plastic Neg
B Corp

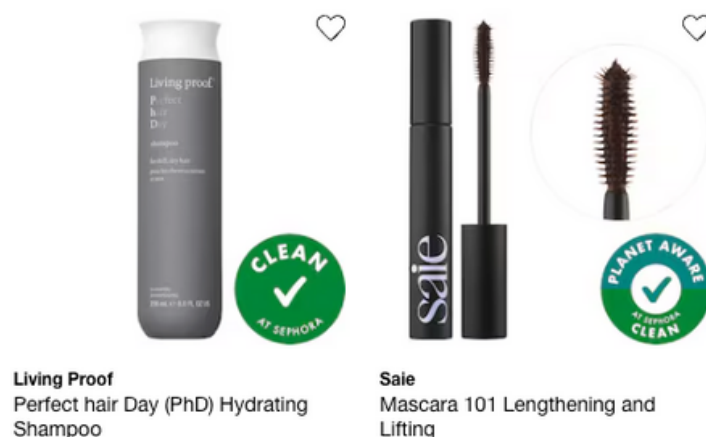
Independent brand data

Carbon footprint data

Retail certifications

Sephora Clean
Sephora Planet Aware

With the top answer indicating that over a third are not familiar with industry certifications, it's clear there's more work to be done, especially as some certifications face credibility challenges. (See: [Dr. Bronner's Statement on Dropping B Corp Certification](#)).



Ultimately, education will require more than putting a logo on a product label. Sephora, for example, has built an ecommerce experience where certifications function as visual and clickable filters to guide shoppers to more sustainable purchases.

3 key takeaways for product innovators in beauty and beyond

Consumers take sustainability seriously—so should you

Like the Little Black Dress, going “green” is not a fad—it’s timeless. With all consumer groups growing more climate conscious year over year, sustainability in your product development cannot be ignored. An investment in sustainability is an investment in the future viability of your brand.

Sustainability isn’t just for Gen Z

While Gen Z may demonstrate the most concern for eco-friendly products compared to other age groups, numbers are rising across the board. In a world where climate change is impacting more consumers’ daily lives, all cohorts are developing more consciousness and feel the urgency to make a change in their purchase behaviors.

Innovative product experiences are necessary

Brands need to go beyond certifications and on-pack labels. Innovative examples like Sephora’s ecommerce experience that literally guide shoppers to more sustainable purchase decisions are necessary for education, marketing, and behavioral change.

About Highlight

Highlight's in-home product testing platform helps CPG brands innovate, test, and successfully launch (and relaunch) better products for people and the planet. Ship your product to Highlight, and our logistics team repackages for our owned community of testers. Quickly field IHUTs (in-home usage tests), concept tests, sensory evaluation, and more, then watch as results and your automated analytics roll in. Highlight's customers have tested products in early development, blind-tested products against the competition, and benchmarked in-market products for category insight.

Learn more at letshighlight.com.