



Connecting Benefits With Values
Through Personal Consumption

SUSTAINABILITY 2017

REPORT OVERVIEW | HIGHLIGHTS | ORDER FORM



HARTMAN GROUP NATIONAL SYNDICATED RESEARCH

Background & Approach

Today's consumers want to make better purchase decisions, and to do this they want to be better informed. They want to know "what's inside" before they buy. And what they want to know extends well beyond product and packaging characteristics. Consumers today increasingly view sustainability and corporate responsibility — from organic ingredients to animal welfare to company treatment of employees and energy conservation — as aspects of quality, not just a "feel-good factor."

Since 2010, The Hartman Group has tracked the various points of entry into the World of Sustainability based on a consumer's worldview and unique life experiences.

Sustainability 2017 tracks and investigates how consumers understand, prioritize and connect four zones (personal, social, environmental, and economical), exploring differences between consumer demand for and actual purchasing of sustainable products, and attitudes toward corporate transparency issues. The report updates understandings of their evolving attitudes, behaviors and aspirations regarding sustainability, including category adoption and the ways in which sustainability and transparency concepts manifest in consumer discourse.

Sustainability 2017 combines the strength of a robust quantitative study with in-depth ethnographic consumer immersions. This integrated approach allows us to go beyond the usual listing of motivations and barriers to uncover the principal drivers responsible for moving consumers along the adoption path in the World of Sustainability. It also allows us to probe on differences in aspirations and actions, and how attitudes toward sustainability and transparency play out in consumers' everyday environments and purchasing.

Key topic areas of examination include:

- Beliefs, attitudes and behaviors related to sustainability and

transparency

- High-priority issues for consumers
- Sustainability and transparency purchasing criteria
- Continuing trends and emerging issues, including food waste, animal welfare, sustainable agriculture, certifications and claims, and packaging considerations
- Trade-offs and pricing consideration
- Barriers to sustainability-based purchasing
- Best practices for corporate responsibility efforts
- Trending on key measures



Methodology & Table of Contents

METHODOLOGY

Quantitative Methodology

Nationally representative survey, fielded online in early August, 2017 (n=1,500). General U.S. population, aged 18-71.

Qualitative Methodology

- Fielded July-August, 2017
- **In-home ethnographies:** 2-hour in-home individual interviews, including a tour of sustainability-related spaces and kitchen food storage
- **Virtual interviews:** 75-minute interviews via Skype
- **Homework:** All respondents completed a homework assignment prior to their interview, involving 1) photos + a writing assignment and 2) a photo or video walk-through of key sustainability items and the contents of their kitchen, pantry, pet food storage area, and cleaning/personal care items.
- Aged 19-70
- Mix of sustainability segments, gender, household income, children/no children <18 in HH, race/ethnicity, and U.S. census regions

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ABOUT THE REPORT

General report (PowerPoint and PDF) including executive summary and demographic data tables (Excel). Product Price:

- **Before November 15, 2017 - \$12,500**
- After November 15, 2017 - \$15,000

Release Date: September 2017
Market Coverage: U.S. market

Report Length: 111 pages

To purchase the report, fill out the order form on the last page of this overview.

Report Highlights

The Hartman Group has been tracking consumer attitudes and behaviors surrounding sustainability and related issues in the U.S. since the 1990s.

Eighty-seven percent of adult consumers are inside our World of Sustainability, meaning that sustainability-related concerns impact their values, attitudes, and actions in at least some measure.

Within this World, we segment consumers based on the intensity of their involvement and how closely their aspirations match their actions.

In 2017, consumers view sustainability more holistically than ever before, as encompassing interconnected sets of issues related to being both a responsible consumer and a responsible citizen.

While retaining strong environmental associations, sustainability also overlaps with personal benefits, especially those related to health and wellness.

- Consumer-defined dimensions of sustainability roughly align with The Hartman Group's four overlapping zones of responsibility — personal, social, environmental, and economic.
- More engaged consumers identify sustainability with all four zones of responsibility, but there are differences by generation. Boomers link sustainability more strongly with environmentalism. Millennials are more likely to see it through the lens of personal responsibility, viewing attributes like organic and all-natural as both sustainability and quality cues.

Most consumers place primary responsibility for sustainability with individuals, since they see individuals as determining both

company practices and governmental policies.

- However, most also view large companies and the government as important actors, with more placing responsibility with governments than in the past.

More consumers seek out information about sustainability than in the past, and labor issues and environmental contamination have become more salient issues.

Packaging is integral to sustainability in terms of both materials and packaging's role in communicating sustainability practices and product information to the consumer.

- Although concern about packaging materials appears to be declining, this may be due to the increasing availability of sustainable products. Packaging remains connected to many higher-level issues that consumers prioritize, such as conserving resources, recycling, and avoiding toxins.
- Consumers across the board scrutinize packaging for attributes they prioritize. Millennials show a preference for reusable and non-existent packaging, and women are more likely than men to scrutinize packaging materials. Third-party certifications are key for engaged sustainability consumers, who look primarily for seals showing organic, fair-trade, and non-GMO, and indicating animal welfare.
- Among highly engaged consumers, there is a desire for some kind of all-encompassing sustainability certification. Many feel that the environmental piece is lacking in the most common certifications.

Concerns about animal welfare and its impact on personal health and food quality are still high, even if the trend line has not significantly grown.

SUSTAINABILITY 2017

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- As antibiotic- and hormone-free animal products have become easier to find, it's likely that many feel they are taking appropriate action in buying those products.
- Animal welfare is an important pathway into the World of Sustainability for many consumers. Though most are driven by personal health concerns related to antibiotics or hormones, the morality of animal welfare helps reinforce attitudes and behaviors.

Openness and honesty are becoming the currency of trust for consumers who care about sustainability. They want to see corporate responsibility efforts that indicate an authentic commitment to ethical action — especially on-pack.

- Transparency is particularly key for retailers, whom consumers view as arbiters of sustainability standards and curators of sustainable products. Retailer context thus makes a big difference in building trust with sustainability consumers.
- Beyond retailer context, consumers identify transparent products and open and honest companies by looking for an accumulation of characteristics.

While consumers acknowledge the importance of climate change, most are unsure how to address it. Other sustainability trends include a growing awareness of waste — especially food waste — and water issues.

Consumers are remarkably consistent in which sustainability attributes they value across categories, retailers, and restaurants. Their top issues — avoidance of toxins, animal welfare, fair labor practices, and minimizing pollution — show the interconnectedness of the zones of responsibility.

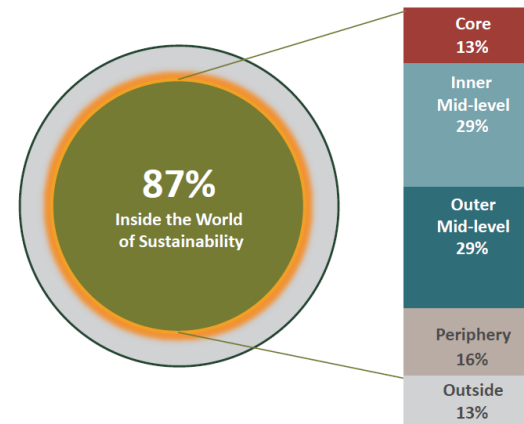
- Consumers who value sustainability do not compartmentalize where and when they prioritize it. Likewise, if they are willing to pay more for a particular attribute in one category, then they are likely to pay more for it in another.
- Nevertheless, consumers are just a bit less likely to rate sustainability-related attributes as important in personal care and household cleaners than they are in food/beverage and pet food categories.

When it comes to choosing restaurants, sustainability credentials function as a marker of quality for consumers.

- More engaged sustainability consumers are more likely to dine out at fast casual restaurants and coffee shops relative to the general population, suggesting that sustainability likely plays a more important role in those locations.

Sustainability World Model

87 percent of consumers are inside the world of sustainability. Those inside the world are impacted in their attitudes and behaviors by sustainability in some way.



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