

2017

SUSTAINABILITY

Understanding the Connections
Between Consumers, Companies,
Products and Doing Good for the
Greater Good



HARTMAN GROUP SYNDICATED RESEARCH FOR Q3 2017
CONSUMER UNDERSTANDING | BEHAVIORS | TRENDS



SUSTAINABILITY 2017

Syndicated Research for Q3 2017



THE HARTMAN GROUP'S ONGOING SERIES OF SYNDICATED STUDIES ON CONSUMERS' SHOPPING BEHAVIORS AND TRENDS

UNDERSTANDING THE CONNECTIONS BETWEEN CONSUMERS, COMPANIES, PRODUCTS AND DOING GOOD FOR THE GREATER GOOD

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."

The right type and amount of company transparency can therefore go a long way toward both responsibility and quality perceptions. However, the various issues at play are complex and mean different things to different types of consumers. What issues resonate most, and with whom? What new issues are on the horizon? What are consumers willing to pay more for? What is the best way for corporations to communicate corporate responsibility and sustainability efforts to their consumers? What do consumers consider a nice-to-have versus an expectation or greens fee?

Since 1989, The Hartman Group has tracked consumers' evolving beliefs, practices and aspirations in the environmental and social values marketplace. **Sustainability 2017** will update our previous work, showing changing attitudes, behaviors and emerging trends. Through our signature approach of robust quantitative and rich qualitative methodologies, we will identify the underlying motivations and beliefs driving how consumers act on current understandings of sustainability and transparency in the food, beverage and household goods space.

The outcome of the study will clarify the ways in which sustainability and transparency concepts manifest in consumers' understanding of product quality. It will also identify, track and explore key trends and new, emerging issues, such as food waste.

Ultimately, the study will illuminate emerging opportunities for CPG manufacturers, food and household goods retailers, food service companies and restaurants, and consumer goods companies looking to leverage sustainability as a corporate responsibility platform and marketing technique.

TIMELINE

Sustainability 2017 will field in Q3 2017, with a final report delivered at the close of the quarter.

UNIQUE PARTICIPATION OPPORTUNITIES

Through a syndicated study, you will obtain a significant amount of data, insights and strategic analysis at a fraction of the cost of underwriting an independent custom research study. Additionally, customization options are available on a first-come, first-served basis (see below).

METHODOLOGY

- Integrated qualitative ethnography and quantitative online survey.
- **Quantitative:** nationally representative online survey of minimum n=1,500 U.S. adults (18-71). Readable samples of World of Sustainability segments and standard demographics (e.g., gender, ethnicity, generational cohorts).
- **Qualitative:** a combination of in-person and virtual ethnographies with sustainability consumers representing key demographics and segments.

FINAL DELIVERABLE

- In-depth report (in PowerPoint format) of overall findings, including executive summary, complete analyses with trended-data comparisons to previous studies (where relevant), supported by full-color charts and visuals.
- Accompanying the general report will be a supplemental set of data tables (Excel format) with a breakdown of key demographics.

PARTICIPATION COSTS

- **Before July 31, 2017: \$12,500**
- After July 31, 2017: \$15,000
- Customization options, including oversampling, proprietary questions, inclusion of categories and special data runs, are available to a limited number of study participants. **They are handled on a first-come, first-served basis. Please contact us for a quote.**

TIMELINE

- Fielding Q3 2017
- Customization options input request deadline June 30, 2017
- Final report delivered by end of Q3 2017



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STUDY BACKGROUND

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. We explore the corporate idea of the triple bottom line of *People, Planet, Profit* from the consumer's point of view. Our research early on identified and includes a fourth factor — perhaps the most important from the consumer perspective — *Personal Benefit*.

Sustainability 2017 will continue to track and investigate how consumers understand, prioritize and connect these four zones, exploring differences between consumer demand for and actual purchasing of sustainable products, and attitudes toward corporate transparency issues. The study will update 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

The study also covers topics based on sponsorship input, which are complemented by The Hartman Group's experience in the sustainability and transparency space. We have a limited amount of room for sponsored input, which we include on a first-come, first-served basis. Contact us today for feasibility and pricing!

Final Report Deliverable

The final deliverable will be a high-impact PowerPoint report focusing on the study objectives and research questions. The report will include an executive summary, detailed findings and resulting implications along with strategic recommendations. Supplemental data tables will also be provided.

Will the Sustainability Gap Narrow in 2017?

Familiarity with 'Sustainability' reached an all-time high in 2015. Yet few consumers can identify specific companies or products that exemplify sustainability values, implying that the term remains somewhat nebulous and hard to relate to.

This gap between familiarity and concrete association may represent an opportunity for a company to establish a competitive advantage. A company that can explain in simple terms the connection between actions it takes and sustainability can improve its image with those who are in the World of Sustainability.



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ISSUES EXPLORED

Sustainability 2017 will explore topics that allow us to follow patterns and connect the various elements that guide consumers' understandings, practices and purchasing related to sustainability and transparency as pillars of quality. As in previous sustainability studies, we will segment consumers according to their engagement with sustainability, exploring differences and similarities among segments. Wherever possible, we track measures over time to show trends.

Areas of examination include:

Sustainability: The Consumer Understanding

- What is the consumer understanding of sustainability and transparency today?
- What are consumers' arenas of action, aspiration and ambivalence?
- How do consumers adopt sustainability beliefs and behaviors?
- Where do various environmental, social, economic and transparency issues rank in the hierarchy of important issues in people's lives (e.g., animal welfare, labor practices, material sourcing, energy conservation, charitable initiatives, political affiliations)?
- What issues are growing in importance, and what trends are on the horizon?

Transparency, Credibility and Trust

- What do consumers want to see from corporations regarding sustainability and corporate responsibility practices? Where do they want to see it?
- What issues contribute most to consumer perceptions of product/service quality and corporate transparency?
- How important is sustainability and corporate responsibility in consumer purchasing?
- What issues are deal-breakers for consumers?
- How credible do consumers find corporate statements and efforts on sustainability and corporate responsibility issues?
- How does packaging (materials and language/claims) contribute to consumer perceptions of sustainability and corporate transparency?

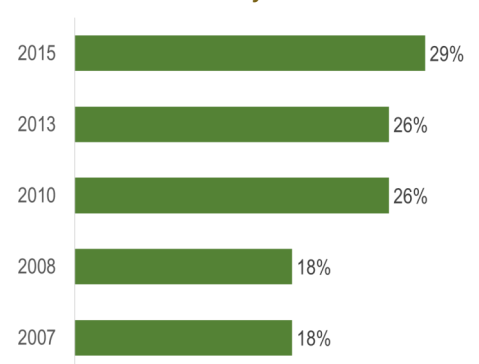
Behaviors and Purchasing

- What sustainability-related behaviors do consumers actually do? What do they aspire to do?
- How do consumer understandings of sustainability issues play out in their perceptions and purchasing of products and services?
- What products and services are more or less affected by consumer perceptions of sustainability and corporate transparency?
- How much are consumers willing to pay for sustainable products and services?
- How do sustainability and transparency issues affect consumer perceptions and purchasing of various CPG categories, particularly food and beverage?

How Often Are Purchase Decisions Based on Sustainability Concerns?

What Will 2017's Findings Tell Us About the Trend Line?

Frequency That Purchase Decisions Are Based on Sustainability Concerns



Consumers say they want sustainable products but don't always buy them. In 2015, 29 percent of consumers said they "usually/always" based their purchase decisions on sustainability and 19 percent of consumers said they were buying more sustainable products than in the previous year.

Source:
Sustainability: Transparency 2015 report,
The Hartman Group



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Sustainability 2017 Syndicated Study Participation Form

To underwrite participation in the Sustainability 2017 syndicated study, please fill out the form below and return by email or fax to:

Blaine Becker
Senior Director of Marketing
f: 425.452.9092
e: blaine@hartman-group.com

Cost

- General report, before July 31, 2017: \$12,500**
- General report, after July 31, 2017: \$15,000
- Customization options: Contact us for quote (deadline is June 30, 2017)

Terms: Due upon receipt of invoice

Name

Title

Company

Address

City / State / Zip

Phone

Email

Signature

Date Signed

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