Consumer awareness of sustainability is at an all-time high: almost 8 in 10 (79 percent) consumers are familiar with the term “sustainability.”

Transparency is a big, complex issue. It is the one word that captures the swelling chorus of consumer demands in the sustainability marketplace. 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.

Quality information, then, lies at the heart of what motivates purchase.

The Hartman Group’s Transparency 2015 report provides an in-depth understanding of transparency from the consumer’s perspective. It is a comprehensive exploration of key topics that cover:

- Meaning of ‘sustainability’ and ‘transparency’
- Important elements of trust and transparency
- Sustainability practices
- Sustainability information sources used
- Importance of sustainable packaging
- Importance of sustainability/transparency dimensions of various product categories
  - Frequency of purchasing and willingness to pay more for products with specific sustainability dimensions
  - Barriers to purchasing sustainable products
- Food service and food retail sustainability choices

ABOUT THE REPORT

Methodology
Quantitative online survey: Nationally representative online survey of 1,779 U.S. adults (aged 18 to 69) was fielded in February 2015.

Qualitative: Qualitative techniques included social network party, in-home ethnographies and national telephone interviews with consumers between the ages of 21 and 55 representative of the four segments within the World of Sustainability.

Report length: Total of 113 pages in PowerPoint and PDF format including executive summary and recommendations. A standard set of demographic data tables (Excel format) accompanies the report.

For pricing information, please refer to the order form on the last page.
Since 1989, The Hartman Group has mapped consumers’ evolutions, adoptions and aspirations in the environmental and social values marketplace. We have seen that a great many consumers believe their purchase decisions are at least as important as their votes in effecting social change, and in many instances, they feel their purchasing power has a greater impact on society than their voting.

EXECUTIVE SUMMARY

Introduction
The Hartman Group’s Transparency 2015 study serves two purposes. First, it provides an update on the long-running series of syndicated studies on Sustainability, focusing on the changes since our most recent report in 2013. Sustainability issues covered include:

- Products/ingredients (how they are made, what’s included or absent)
- Sourcing practices, including country/region of origin
- Animal welfare
- Employee rights
- Corporate ownership

Second, we took an in-depth look at Transparency as it relates to consumer trust in terms of:

- How consumers evaluate what they hear from companies
- What they want to know about products and companies’ business practices

We sought to understand what consumers want to hear from companies to earn their trust and learned which companies consumers think are doing a good job and which have room for improvement. The report’s findings, insights and recommendations help guide packaged goods companies, retailers and food service operators in their efforts to be relevant in today’s complex, wired environment and to build brand loyalty among their customers.

Key Observations on the World of Sustainability

Awareness of, and familiarity with, sustainability continues to grow, reaching an all-time high of 79 percent in 2015 (up from 74 percent in 2013).
As in prior years, we analyzed the findings in terms of the Hartman Model of the World of Sustainability.

Based on this model, in 2015, 88 percent of American consumers are ‘inside’ the World of Sustainability, essentially meaning that this large majority considers sustainability aspects in their purchasing decisions at least some of the time.

Consumers’ orientation in the World of Sustainability ranges from the most intensely involved (the Core) to those least involved (the Periphery).

There is clear evidence this year that sustainability is becoming more prevalent in consumers’ attitudes and actions:

- An increasing percentage of consumers define sustainability in terms of natural resource conservation, land stewardship and responsible farming methods
- More consumers claim that their purchasing decisions are influenced by environmental and social well-being
- Almost a fifth claim to be buying sustainable products more frequently

However, consumers continue to struggle to identify sustainable products and companies, hindering them in their desire to support sustainable initiatives and contribute to the welfare of society and the environment.

**Key Observations on Sustainability Practices**

One key area of sustainability that is growing in consumer consciousness is product origin, manifesting in support for local products and those that are made in the US. This support appears to have several motivations:

- Concerns over product/ingredient safety, leading to an avoidance of products from countries whose production processes and ingredients are suspect
- Desire to support the US economy and the American workforce
- Regional pride in one’s own community and a desire to stimulate the local economy
- Desire to avoid the harmful effects of long-distance transport on product quality/freshness

Another area of growing concern is animal welfare. Consumers are looking for information on:
• Sustainable fishing practices and knowing that catches do not harm species (such as dolphins) that are not going to be harvested for consumption
• How animals are raised: Are they treated humanely and raised in as natural an environment as possible? Are they given hormones or antibiotics that may impact consumers’ health?
• The use of animals in product safety testing

A third area of heightened interest is fair treatment of employees. This topic gets both positive and negative press surrounding various corporations’ practices. When it comes to retailers and food service companies where employees are visible to consumers, employee welfare is of particular interest. Consumers like to support companies they know are:

• Assuring safe working conditions
• Providing fair wages and benefits

Key Observations on Transparency

Consumers increasingly want to learn about the sustainable nature of the products they purchase and the sustainable practices that companies are adopting:

• 62 percent have recently sought information on sustainable products: they increasingly read package labels on the products they purchase and turn to the Internet for more in-depth information
• Shoppers also appreciate the efforts retailers make to communicate their stance on sustainability issues in terms of both their own internal policies and pertinent details about the products they choose to carry
• The far majority (78 percent) trusts what a company says about its efforts regarding the environment and other sustainability practices, and it is increasingly clear that consumers want to be able to easily access information on companies

Consumers expect a company to openly share its practices with the public. They most want to hear about:

• What is in the products they buy
• Where and how products are manufactured
• What a company does to assure the welfare of its workers as well as the animals used in its products