Sustainability 2019

Beyond Business as Usual

Sustainability 2019: Beyond Business as Usual illuminates how the sustainability mindset and marketplace have changed over the years from the consumer perspective. New consumer energy and movement around the climate, the environment, plastics, and economic issues are helping to re-shape sustainability as a cultural value and purchasing consideration.

In ***Sustainability 2019***, we explore these shifting attitudes and behaviors. We also update long-standing data sets to show change over time, with a deep dive into packaging and a broad overview of sustainability in CPG, restaurants, and food retail, including e-commerce, making ***Sustainability 2019*** essential reading for anyone with a stake in the food and beverage industry.

Methodology

Sustainability 2019 will utilize an integrated methodology combining a quantitative online survey and qualitative ethnography. Fielded July, 2019.

Quantitative Custom Survey: nationally representative online survey of n=1,697 U.S. adults (18-73) including oversample of n=278 aged 18-21. Readable samples of World of Sustainability segments and standard demographics (gender, ethnicity, generational cohorts, etc.).

Qualitative Ethnography: a combination of in-person and virtual ethnographic interviews with sustainability consumers representing key demographics and segments.

What You Get

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

Report Price

List price: $15,000 **Now: $12,500**

Release Date: September 2019   Report Length: 115 pages   Market Coverage: U.S. market

The order form to purchase the report can be found on the last page.

What's Inside the Report

Methodology

Executive Summary

- As in past years, we segment consumers using our World of Sustainability model.
- Sustainability is a cultural value and defining concern for today's consumer.
- Heightened challenges and institutional inaction fuel hunger for progress.
- Consumers increasingly hold companies and government more responsible for sustainability than individuals.
- At the same time, consumers are scrutinizing their own consumption in new ways, looking for opportunities to reduce waste and their personal carbon footprint, with critical implications for CPG businesses.
- Growth in sustainable purchasing is fueled by improving perceptions in key categories.
- Consumers value convenience but are increasingly aware of the sustainability trade-offs.
- Packaging design, disposable plastic and paper products, e-commerce's footprint, and restaurant impacts are just a few of the territories where consumers feel their lifestyles come into conflict with what is good for the world.
- In a more collaborative future, consumers expect corporations to invite scrutiny and partnership as they move beyond "business as usual."

Sustainability in Context: Where are we now? Where are we going?

- Sustainability is a defining concern for today's consumers—with a younger, more diverse vanguard that attests to its staying power (chart: percentage of consumers who consistently base purchasing on sustainability)
- For consumers, sustainability challenges are more acute than ever before
- Amid fear and anxiety about the future, consumers are hungry for leadership and commitment to action—with emotional connection
- In this tense national mood, consumers appear to be more willing to prioritize the greater good in their purchasing than in the past (chart: reason for purchasing sustainable products—because they are better for…)
- Compounding this sense of inadequate action is Americans' low level of trust in corporations and government, especially on the environment
- In spite of a growing green market landscape, consumers still have trouble identifying sustainable companies
- A broader awareness of the need for collective action for the collective good means going beyond "business as usual"
- Key takeaways

The World of Sustainability

- The vast majority of consumers are inside the World of Sustainability
- Sustainability segments by demographic group
- The Mid-level and Periphery represent a large share of the population that selectively adopts sustainability trends emerging from the Core
- Purchasing motivations and behaviors are distinct among World segments, with the Periphery most motivated by personal benefits

- Segment Profile: Core
- Segment Profile: Inner Mid-level
- Segment Profile: Outer Mid-level
- Segment Profile: Periphery
- Distinct areas of concern incorporate personal, social, environmental, and economic dimensions—and act as pathways to deeper engagement
- For consumers, sustainability encompasses a landscape of concerns with personal, social, economic, and environmental dimensions
- Overlap among Zones of Responsibility increases with consumer engagement
- Key takeaways

Aspiration vs Action: Sustainability in everyday life

- Outside of the Core, most consumers continue to engage with sustainability primarily through their aspirations and good intentions
- Definitions of sustainability (trended to 2013)
- Sustainability action vs aspiration
- Sustainability action & aspiration: by generation
- Commitment to change: I'm willing to drastically change my lifestyle to live in a more environmentally sustainable way (*by sustainability segment; by demographic*)
- Climate's rise as an element of sustainability has been steady; consumers are starting to take action, and food is a key area they address
- As consumers begin to take a closer look at the effects of their lifestyle on the environment, the zero-waste movement has grown
- News about shifts in the global recycling market have resulted in anxiety and frustration among engaged consumers about the impact of recycling
- Responsibility for sustainability: Who bears the most responsibility for making our world more sustainable?
- Awareness of key sustainability trends
- Most important sustainability issues for companies and businesses: Which are the top 3 issues most important for companies and businesses to focus on right now?
- Key takeaways

Transparency: Building credibility in an era of distrust

- Desire for transparency on sustainability: I would like to see companies' sustainable practices be more visible to the public
- Consumers often hesitate to award companies the halo of sustainability, even when they have favorable views of their products
- Key elements of company responsibility: Top 5 most important things to know to assess company responsibility
- Top 3 groups companies should be responsible To: What are the top 3 groups a responsible company should focus on?
- Sources of inspiration and information about sustainability (Used in past 3 months)
- Trusted information sources for corporate responsibility

- Used social media/online for sustainability inspiration or information (past 3 months)
- Shopping behaviors related to transparency
- Building credibility
- Package seals and certifications — awareness and influence
- I'll pay more to support companies that support a good cause; I'll pay more to support companies that share my values
- Communicating sustainable practices is part of quality and reputation management, while responsiveness to consumers sets brands apart
- Key takeaways

Conscientious Consumption: Sustainability in CPG purchasing

- Which has the greatest impact on society?
- Importance of company practices/policies in purchasing decisions
- Past year change in sustainable product purchasing: When it comes to sustainable products, I now buy…
- Barriers to sustainable product purchasing
- Frequency of considering sustainability in food and beverage shopping: How often do you actually make your food and beverage selections with sustainability, social issues, or labor practices in mind?
- Food and beverage purchasing criteria
- Only Core consumers truly prioritize sustainability above most personal benefits
- Within food and beverage, brands messaging sustainability use a constellation of cues that resonate across the spectrum of engagement
- Aspects of animal welfare that increase purchase likelihood (Among those for whom animal welfare is important)
- Different pathways to sustainable living translate into distinct food approaches and priorities—even within the conscientious Core
- Sustainability in Personal Care: Personal care purchasing criteria/frequency (Among P3M purchasers)
- While efficacy is essential, natural formulations in personal care have gone mainstream and cue healthy, high quality, and sustainable to consumers
- Sustainability in Household Cleaners: Household cleaners purchasing criteria/frequency (Among P3M purchasers)
- Barriers to adoption of more sustainable household cleaners are weakening
- Sustainability in Pet Food: Pet food/treats purchasing criteria/frequency (Among P3M purchasers)
- Pet parents find themselves confronted by some trade-offs when incorporating sustainability concerns; sustainability vs cost is just one
- Key takeaways

Responsible Sourcing: Sustainability at retailers and restaurants

- Responsibility for household shopping: How much of your household's shopping do you, yourself, do?
- Responsible sourcing: brick & mortar grocery
- Brick & mortar grocery selection criteria/frequency (Among P3M purchasers)
- Consumers evaluate retailer sustainability by what they can see in-store, from labor issues to product selection to plastic bag policies
- Consumers across segments notice a retailer's effort to minimize consumer package and plastic waste (beyond product packaging)

- Responsible sourcing: e-commerce
- Online retailer selection criteria/frequency (Among P3M online grocery shoppers or Prime members)
- Shopping online is a place engaged consumers must often give up their sustainability criteria, but they are able to justify it in other ways
- Responsible sourcing: restaurants
- Restaurant channels visited (past 3 months)
- QSR/fast food selection criteria/frequency (Among past 3 month purchasers)
- Consumers continue to equate QSR with cheap, unsustainable, unhealthy food—but it doesn't stop them from eating there
- Responsible sourcing: fast casual/coffee shop. Selection criteria/frequency (Among past 3 month purchasers)
- Consumers expect more from fast casual restaurants and coffee shops than they do from QSR, especially when it comes to waste and packaging
- Key takeaways

Packaging Deep Dive

- Packaging, particularly its disposal, is a primary way consumers understand and mitigate their personal environmental footprint
- Packaging considerations: When purchasing products, how important is it that its packaging be…?
- Nevertheless, even Core consumers have trouble balancing the convenience of disposable products with their desire to create less waste
- Mid-level and Periphery consumers see recycling as the solution to the problem of waste, but Core see it as part of the problem
- Today's ideas around recycling rest on the concept that trash has a "right" place—but engaged consumers reject this assumption
- Most concerning types of packaging: Top 3 concerning types of food packaging related to health or the environment
- Single-use plastic has the hallmarks of a growing issue, prompting even less engaged consumers to think more about limiting plastic use
- Single-use plastic has staying power as a consumer issue because it is a highly visible and actionable representation of the impact of our lifestyles
- However, while consumers show high levels of concern about single-use plastics, they also have a limited sense of what they can do about it
- "Opting out" of the culture of convenient, disposable consumer products can be quite difficult
- Desire for packaging solutions
- Two ways governments and companies can improve packaging problems and perceptions are gaining awareness among consumers
- Consumers see packaging, like climate change, as a collective problem that requires action from government, companies, and individuals alike
- Key takeaways

Implications and Recommendations

Syndicated Report Order Form

To order the ***Sustainability 2019*** report, please fill out the form below and return to:

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

Cost

- ☐ List price: $15,000
- ☐ **Now: $12,500**
- ☐ Total: $___________

Terms: Due upon receipt of invoice

Name	______________________________
Title	______________________________
Company	______________________________
Address	______________________________
City / State / Zip	______________________________
Phone	______________________________
Email	______________________________
Signature	______________________________
Date Signed	______________________________

Terms of Use
The data, information and any material contained in the final report are confidential and proprietary to The Hartman Group, Inc. and are intended only for the internal use of the sponsor's (participant) organization. They cannot be reproduced in any manner whatsoever or distributed outside the organization without prior consent of The Hartman Group, Inc.