



Sustainability 2025: Do Consumers Care?

A Hartman Group syndicated research study

Fielding July-September 2025
U.S. market coverage

***Sustainability 2025* seeks to understand consumers' priorities and values in a time when almost everything is being questioned**

In today's economically pressured and uncertain environment, many companies are reevaluating, if not outright pulling back from sustainability commitments.

Are we witnessing a cultural recalibration where consumers are shifting from collective 'we' values to more individualistic 'me' priorities? If so, how must brands evolve their messaging and strategies to stay relevant?

As sustainability evolves from a buzzword into a more nuanced set of expectations, **the key question is: *which aspects, if any, do consumers truly value—and how do these rank against other priorities?*** *Why* (or why not) do these priorities matter to them, and *what* do their actions—or inactions—reveal about their values?

Building on prior findings in Hartman Group's foundational Sustainability series (fielded since 2008) and deep legacy of decoding consumer values, this study will provide an update on ongoing trends and an invaluable perspective on whether sustainability still motivates behavior when nothing is certain. Applying in-depth exploratory methods, the research will move beyond ideals to expose new dimensions of value and determine if brand signals still resonate.

If the term 'sustainability' is indeed at risk of losing relevance, this report will **help brands reconnect with consumers** by signaling an understanding of what sustainability truly means to them today.

***Sustainability 2025* will provide food and beverage brands, retailers, and food service providers with trended data and crucial insights on:**

- **CONSUMER TRUST:** Do values-driven cues still motivate consumers whose priorities are stretched thin?
- **BRAND EXPECTATIONS:** Do brands need to prove they care about consumers' values, health, and future? What do consumers expect from brands today?

The report will provide meaningful guidance and recommendations to future-proof your business, aligning with today's discerning consumer in an increasingly disrupted marketplace.

In a market of rapid change, activate on shifting consumer priorities while leveraging tracking data from past Hartman Group studies

Through a national online survey, in-depth qualitative interviews, and benchmarking against prior Hartman Group research, the report will take an exploratory approach to how consumer sentiment on the following topics has picked up momentum or morphed over time:

- **What do consumers prioritize today?** Have their values shifted at a time when so much is being questioned? What do they really care about?
- **Is sustainability still a priority? Is it more aspirational than actionable,** especially within a challenging economic environment?
- **Are there new semiotics connected to how consumers relate to sustainability?** Are implicit cues more valuable than explicit claims in today's trust economy?
- **How believable are claims made by companies?** Do consumers feel that trust and transparency have diminished?
- **Are sustainability and related topics taking on new meaning for different generations and cohorts?** Are younger vs. older consumers' perceptions of values and practices distinct?
- **How does packaging play a role in the value/values proposition?** Is cost and/or convenience seen as a tradeoff when it comes to sustainable packaging?

Quality, price, and taste are primary considerations in food purchasing

As baseline considerations, quality, price, and taste are essential elements for products to enter a consumers' consideration set. Only after these needs have been met do consumers consider other factors, such as health, convenience, and environmental or social impact.

Core consumers, however, are an exception: their top three criteria are quality, health, and environmental impact. Core consumers tend to more closely link these attributes and justify higher prices for healthier or more sustainable products as investments, which will ultimately lead to better, and more affordable, long-term outcomes.



I have to be accountable to myself, my future, and my present. [So] I'm careful and conscientious [about price], but by the same token, I recognize the value of health. If I spend more now on things that have less negative ingredients, down the road I'm less likely to have negative health outcomes because I'm investing now.

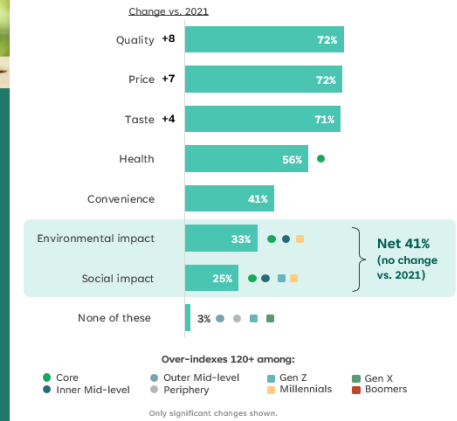
— Eduardo, M, Gen X, Core

The key is having information and comfortably knowing that I'm paying for something that is environmentally friendly – and not a marketing tool by a company to try and justify higher prices.

— Matthew, M, Millennial, Core

Environmental and social well-being issues among food and beverage purchase considerations

Among total, trended



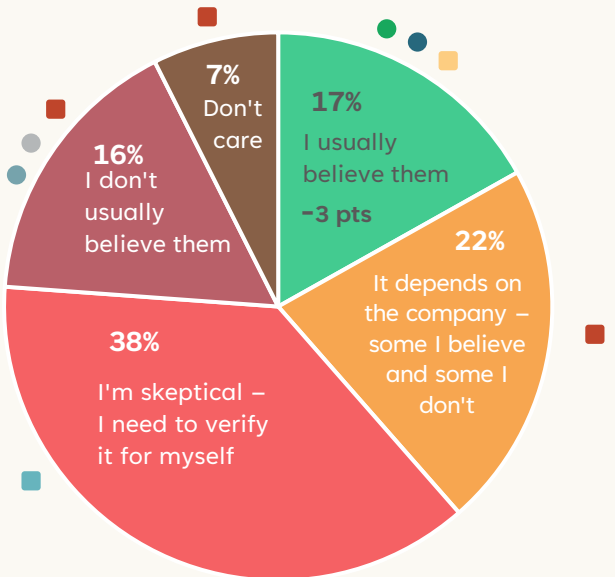
Sustainability 2023, Q42. Of the following attributes, which are the MOST IMPORTANT to you when deciding which FOODS and BEVERAGES to purchase? (Select all that apply) Base: Total n=2165; 2021 n=2202; Core n=274, Inner Mid-level n=623, Outer Mid-level n=364, Periphery n=274; Gen Z n=345, Millennials n=580, Gen X n=605, Boomers n=635.

The final report will include an **executive summary**, **strategic implications**, and **actionable recommendations**, supported by a **comprehensive analysis of trended key data**, **robust charts**, and **visuals**. Consumer quotes woven throughout will add real-world context and bring the insights to life.

Detailed Excel data tables from the study questionnaire accompany the report, allowing for flexible analysis with key demographic breakdowns, including generation, regionality, education, income, and **World of Sustainability segmentation**.

Understand how and WHY consumers decide which brands to trust in a shifting landscape by leveraging a nuanced consumer segmentation to pinpoint your consumer target

SUSTAINABILITY 2023:
Trust in company sustainability claims
Among total, trended vs. 2021



- Over-indexes 120+ among:
- | | |
|---------------|-------------------|
| ■ Gen Z | ● Core |
| ■ Millennials | ● Inner Mid-level |
| ■ Gen X | ● Outer Mid-level |
| ■ Boomers | ● Periphery |

The report will cover emerging topics like:

- Should companies still talk about sustainability explicitly? Or has the term lost power?
- How can brands signal trust as perceptions of quality and corporate integrity evolve?
- Are certifications—such as Fair Trade, B Corp, and Certified Regenerative—gaining or losing traction with consumers?
- Is cost a primary barrier or is the gap now more about belief and trust?
- What happens when companies shift sustainability policies? How do consumers interpret those moves, and what does it say about quality and brand credibility?

Hartman Group’s proprietary World of Sustainability segmentation will answer critical questions like:

- Which consumer segments demonstrate engagement with values-based attributes, and which do not? Exploring trended data, has this shifted over time?
- Have more consumers moved outside of participation in the World of Sustainability? Or have segments within the World shifted?
- What packaging formats resonate best with each consumer type?
- Do different consumer segments make tradeoffs for different reasons? What does that mean for brand engagement?

Gain primary qualitative and quantitative insights with actionable guidance to inform your sales strategy—without the financial or time investments of custom research

Robust integrated methodology

Quantitative research: Nationally representative online survey of U.S. food shoppers aged 18-78, with a minimum total sample of n=2,000 and readable samples of demographic audiences such as age cohorts, race/ethnicity and income tiers. Where possible, data will be trended against similar questions fielded in 2023, 2021 and 2019.

Qualitative research: Literature review of marketing, consumer publications and discourse on food and beverage sourcing and quality; engagement with writings/podcasts by cultural informants; social listening on key consumer platforms; virtual interviews with consumers as well as benchmarking against prior research.

Proprietary segmentation: Hartman Group's proprietary World of Sustainability segmentation is grounded in both consumer attitudes and behaviors, enabling food and beverage companies to efficiently target and communicate with key consumer groups. All data will be run by segment, empowering study purchasers to take strategic direction aligned with their priority audiences.

Final report available September 30, 2025

Report Price: \$12,500 (until June 30, 2025; \$15,000 starting July 1, 2025)

An in-depth PowerPoint report will include an executive summary, implications and strategic recommendations, with a complete analysis of relevant data supported by robust charts and visuals.

A supplemental set of Excel data tables with a breakdown of key demographics will accompany the report.

Proprietary categories, questions and/or custom data cuts may be available. Requests are handled on a first-come, first-served basis.
Contact us for a quote and for feasibility by June 14, 2025.

Turning insights into action: Activation Sessions

Please contact Melissa Abbott to learn more about how you can take your food sales strategy to the next level with the insights from the *Sustainability 2025* report: melissa@hartman-group.com.

Pre-order the *Sustainability 2025: Do Consumers Care?* report now

Report Price: \$12,500 (until June 30, 2025; \$15,000 starting July 1, 2025)

To purchase, please email: melissa@hartman-group.com

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ABOUT HARTMAN GROUP

Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients.

Since 1989, Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deeply studying trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, identifying unique opportunities and winning strategies for our clients.

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