

Methodology: Quantitative Approaches

SURVEY TOPICS

The survey covers such topics as:

- Cultural and lifestyle shifts that drive the sustainability attitudes and behaviors of today’s consumers
- Definitions of sustainability and how differences map to The Hartman Group’s proprietary model of engagement in sustainability, the World of Sustainability
- Sustainability priorities and consumers’ expectations of who is responsible to drive progress on these issues
- How specific topics fit into the broader picture of sustainability and how they affect consumer behaviors, including purchase choices: climate change, social justice, worker welfare, packaging, upcycling, regenerative agriculture and third-party certifications
- The importance of sustainable attributes when purchasing personal care, household cleaning products, paper products, pet food; similarly for online shopping, in-person shopping and restaurant selection

READING THE CHARTS

Main colors used:



Total

Segment colors used as bars and indicators of over-indexing segments:

Age cohorts



Gen Z



Millennials



Gen X



Boomers

World of Sustainability



Core



Inner Mid-level (IML)



Outer Mid-level (OML)



Periphery

Additional indications of differences as noted on individual pages

METHODOLOGY

- An online survey fielded July 19-27, 2023
- n=2,165 US adults aged 18–77 (MOE ±2.1% at 95% confidence level)
- Respondents recruited as a nationally representative sample (balanced by age, gender, division, income, race/ethnicity, and presence of children to match the 2023 Census Bureau Current Population Survey)
- Readable samples include, plus other key demographics:
 - Age cohorts: Gen Z (18-26) n=345, Millennials (27-42) n=580, Gen X (43-58) n=605, Boomers (59-77) n=635
 - Race/ethnicity: Non-Hispanic White n=1227, African American n=328, Hispanic n=286, Asian/ Pacific Islander n=295
 - World of Sustainability segmentation: Core consumers n=274, Inner Mid-level consumers (IML) n=623, Outer Mid-level consumers (OML) n=584, Periphery consumers n=274, Outside the World n=410

Trend from prior years:

Where available, trend is shown from 2021, 2019, 2017, or earlier, with the specific timeframes indicated in chart headers.

Only statistically significant changes are shown, indicated in bold:

+/-XX pts (pts = percentage points)

Familiarity with the term *sustainability* is at an all-time high, but the concept itself is incongruent with consumerism and the consumption of products

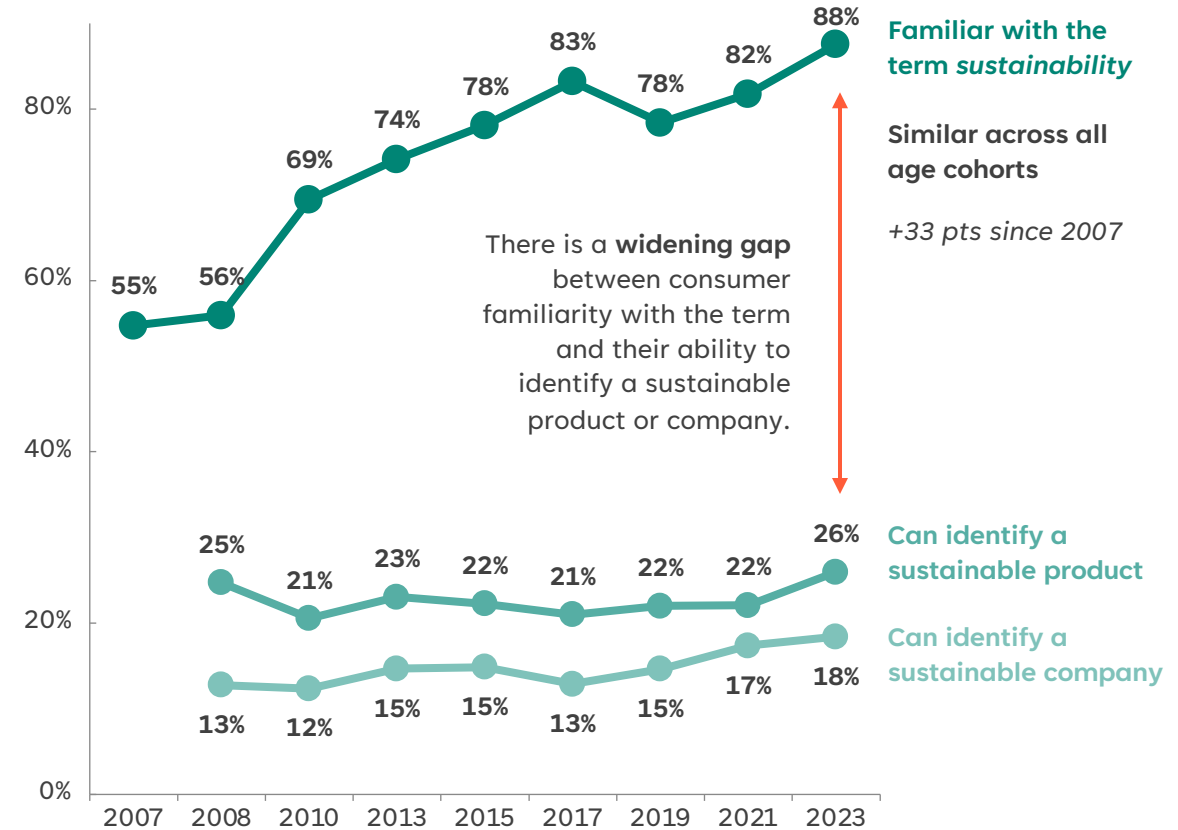
Sustainability as a concept has permeated consumers' consciousness over the past 16 years, to such an extent that awareness of the term is at an all-time high since The Hartman Group started tracking it in 2007. Increasing awareness, however, has not significantly contributed to consumers' ability to identify sustainable products or companies.

So, why does this gap persist?

Sustainability associations are often abstract and carry connotations with the climate, weather, or agriculture, rather than specific products or profit-driven companies. The consumption of products involves the extraction of finite resources, which in nearly all cases is inherently unsustainable in some way. A purely sustainable product or company is a true rarity within capitalist systems. On a basic level, consumers understand this, though they expect companies to be *more* sustainable.

The prevalence of the term in corporate marketing campaigns may be another culprit: With many consumers lacking the time, knowledge, or energy to research a product or company, they can have difficulty differentiating the impact of a specific company's claims and actions from those of others, thereby compounding the challenge for any given product or company to stand out.

Familiarity with sustainability and sustainable companies and products
Among total, trended



Sustainability 2023. Q12. Are you familiar with the term "sustainability"? Q14. How strongly do you agree or disagree with each of the following statements? Bottom 2-box disagree, Trended base (age 18-69): Total 2007 n=1459, 2008 n=1684, 2010 n=1982, 2013 n=1841, 2015 n=1779, 2017 n=1456, 2019 n=1622, 2021 n=2013, 2023 n=1978.

The Hartman Group's World of Sustainability segments consumers based on their level of engagement

The meaning of sustainability can be highly dependent on the individual. The Hartman Group refers to sustainability as *an interconnected set of values and beliefs tied to environmental and social efforts that make the world a better place, both now and for posterity.*

The Hartman Group's World of Sustainability incorporates both environmental and social elements. Components of health and economics are intertwined as well.

Eighty-two percent of consumers are inside the World of Sustainability, and their attitudes and behaviors reflect a level of engagement with sustainability in some way. Those who are outside are not driven by sustainability-related concerns or considerations.

The Hartman Group's World of Sustainability Segmentation

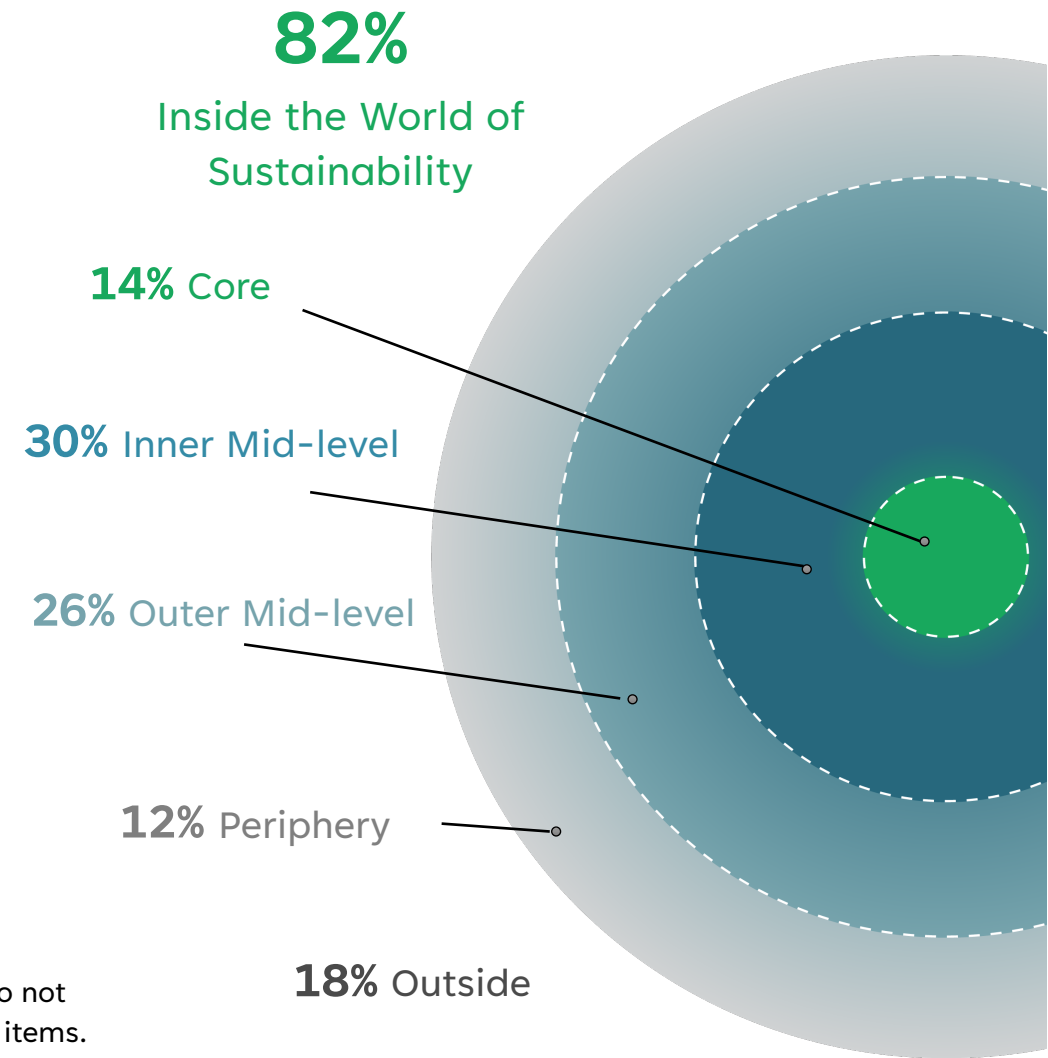
Core consumers are the most engaged with sustainability, with the strongest attitudes, deepest knowledge, and most extensive engagement in terms of daily life and activities.

Inner Mid-level consumers adopt Core attitudes and behaviors pragmatically. They try to build sustainable habits into their lives, and many aspire to alter their lifestyles for the sake of sustainability.

Outer Mid-level consumers are occasionally influenced by sustainability in their purchases but typically consider other factors first, such as personal benefits.

Periphery consumers rarely consider sustainability explicitly in their purchasing decisions, but it does play a role in their value system more generally.

Consumers who are **Outside** the World do not consider sustainability when purchasing items. They are more likely to reject values and attitudes related to sustainability, sometimes for political or ideological reasons.



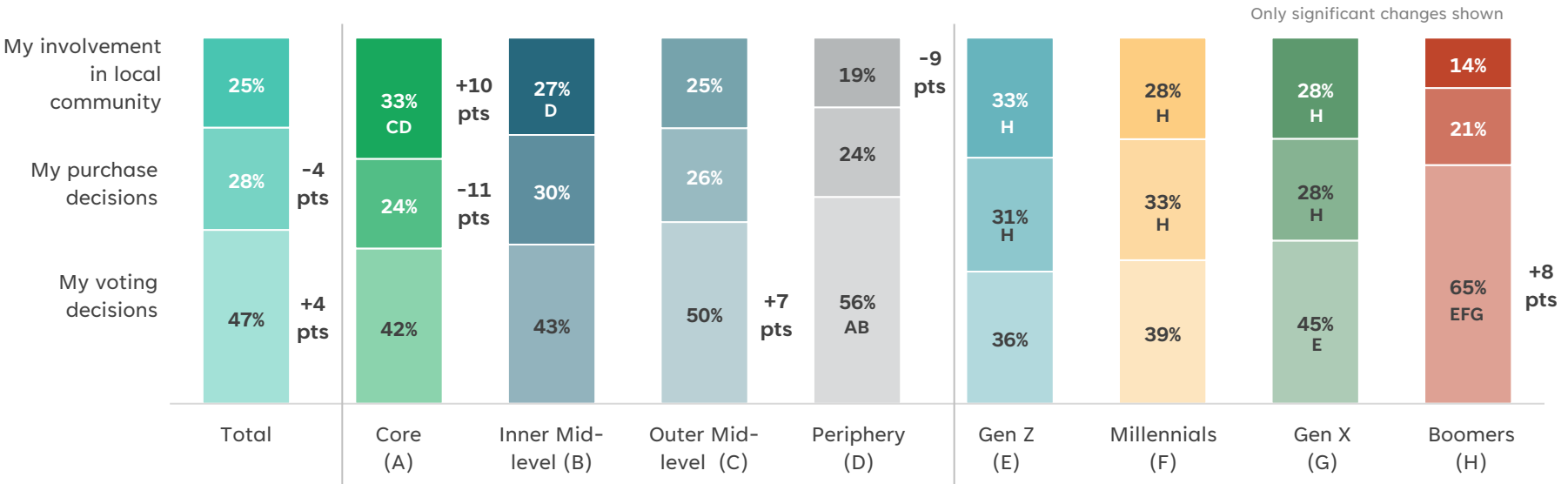
Sustainability 2023. Segmentation based on reported respondent behavior regarding: animal testing, packaging, community issues, supporting companies helping local community, recycling, price, willingness to change lifestyle. Base: Total n=2165.

Voting decisions continue to grow as an important factor impacting society

Younger consumers are understanding more that their voting decisions will impact society (directional increase among Gen Z and Millennials). Older generations have historically placed emphasis on voting and, like younger voters, the percent doing so has increased (significant increase).

This aligns to voter registration trends in recent years. Overall, 69% of citizens of voting age were registered to vote in the 2022 mid-term elections, up over 2 percentage points from 2018.*

Which has the greatest impact on society?
Among total, trended vs. 2021



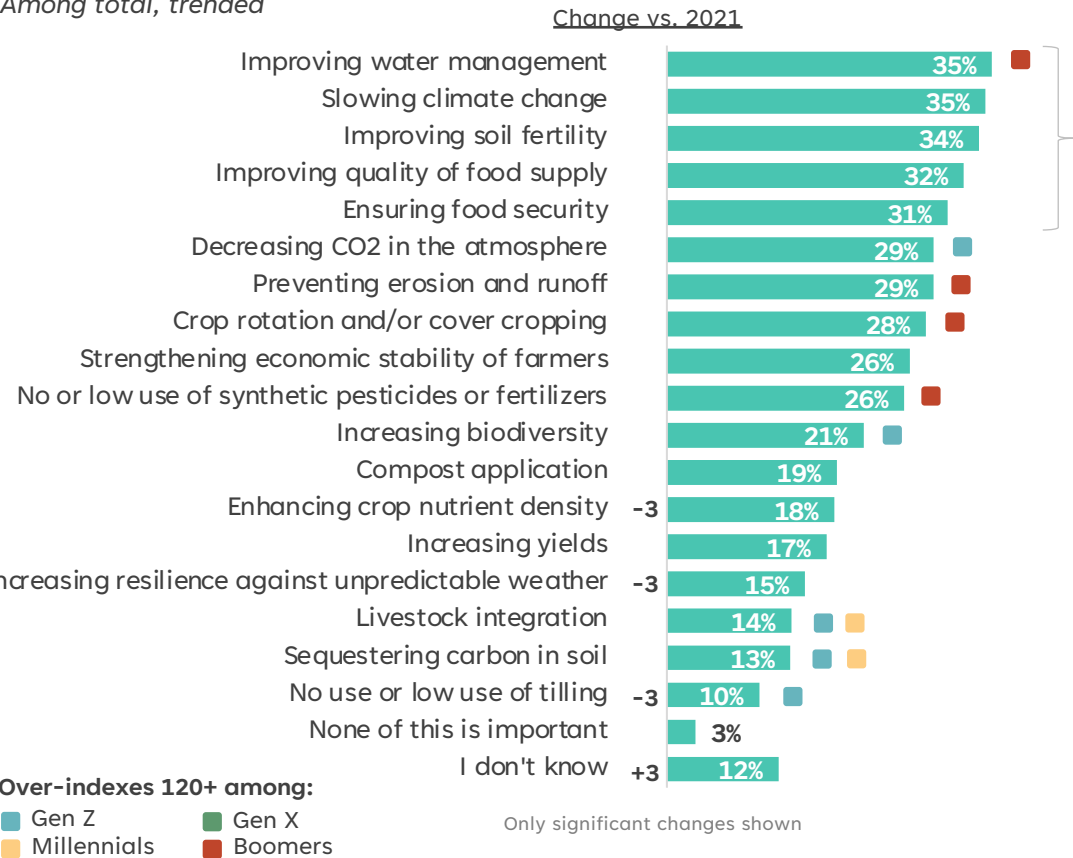
The rise in the perceived impact on voting comes at a cost to the perceived influence of purchasing, though purchases still lead local involvement within most audiences. This shift away from purchasing could be related to several factors including rising prices, or to consumers feeling less empowered to enact change through their purchasing behaviors. It is also likely that, in the current political moment, more consumers are understanding voting to be a more powerful means of enacting societal change.

* United States Census Bureau, "2022 Voting and Registration Data Now Available," May 2, 2023. Capital letters (A, B, C) indicate statistically significant differences between the indicated groups at the 95% confidence level. Sustainability 2023. Q8. In your opinion, which of the following has the greatest impact on society? (Please select one only) Base: Total n=2165; Core n=274, Inner Mid-level n=623, Outer Mid-level n=584, Periphery n=274; Gen Z n=345, Millennials n=580, Gen X n=605, Boomers n=635.

Consumers associate regenerative agriculture with various aspects of land and water management

Most important aspects of regenerative farming

Among total, trended



Top aspects of regenerative agriculture include water, climate, soil, and food, highlighting the broad scope of the practice.

Such a broad array of meanings, however, can invite both potential consumer confusion and abuse of the term by companies and underscores a need for an established standards for regenerative agriculture.

While consumers are less aware of the Regenerative Organic certification than the practice of regenerative farming itself, the label incorporates a variety of animal welfare, regenerative farming, and organic standards that help make the interconnectedness of personal health, food quality, and soil health more directly comprehensible.

Awareness around regenerative agriculture is growing.

77%

of consumers are aware of issues around having enough land farmed using regenerative agriculture (+20 pts vs. 2021).

29%



are aware of the Regenerative Organic Certification, and of those aware, 69% would pay more for it, similar to 2021.

Sustainability 2023. QA1. In recent years, concerns about the negative effects of modern agriculture on soil health, water health and biodiversity have led to efforts to grow crops and raise livestock in more natural, sustainable ways. Which of the following do you believe to be the most important aspects of these efforts? (Select all that apply) Base: Total n=2165, 2021 n=2013; Gen Z n=345, Millennials n=580, Gen X n=605, Boomers n=635; Q16a. For each of the following environmental, social, or community topics and practices, please indicate which answer best describes your experience with it. Base: Total n=2,165, 2021 n=2202. Q64a. There are many types of claims, certifications, and seals that appear on product packaging. For each claim, certification, or seal below, please tell us which answer best describes your experience with it. Base Total n= 2165, 2021 n=2202. Q64b. Here are all the claims, certifications, and seals you indicated you knew a bit about. For each one, please indicate how it affects your purchasing when you see it on an item you're considering. Pay much/somewhat more Base: Aware of certification n=580, 2021 n=672.