

Methodology: Quantitative Approaches

An Online National Survey on Sustainability

The survey covered such topics as:

- Cultural and lifestyle shifts that drive the sustainability attitudes and behaviors of today’s consumers
- How consumers define sustainability after a tumultuous year that challenged their understanding of the world on multiple fronts – and what specific issues concern them most
- Prioritization of sustainability issues and consumers’ expectations of companies and government to drive progress on these issues
- What choices consumers are currently making in their personal lives to address their most pressing sustainability concerns and how this will shift going forward
- Specifically, how the following topics fit into the broader picture of sustainability and how they affect consumer behaviors: social justice, worker welfare, packaging, food waste, online shopping / on-demand delivery

Methodology

- Fielded July 16-29, 2021
- **n=2,202 US adults aged 18-75** (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 2021 Census Bureau Current Population Survey)
- Readable samples include, plus other key demographics:
 - *Age cohorts:* n=480 Gen Z, n=526 Millennials, n=555 Gen X, n=641 Boomers
 - *Race/ethnicity:* n=1,588 Caucasian, n=300 African American, n=254 Hispanic, n=310 Asian / Pacific Islander
 - *World of Sustainability segmentation:* n=294 Core consumers, n=601 Inner Mid-Level consumers, n=658 Outer Mid-Level consumers, n=318 Periphery consumers, n=331 Outside

Reading the Charts

Main colors used:

- Total
- Environmental components of sustainability
- Social well-being components of sustainability

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
- Outer Mid-level
- Periphery

Additional indications
of differences as
noted on individual
pages.

Trend from prior years:

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

Only statistically significant changes are shown, indicated in italics:

+/-XXpts (pts = percentage points)

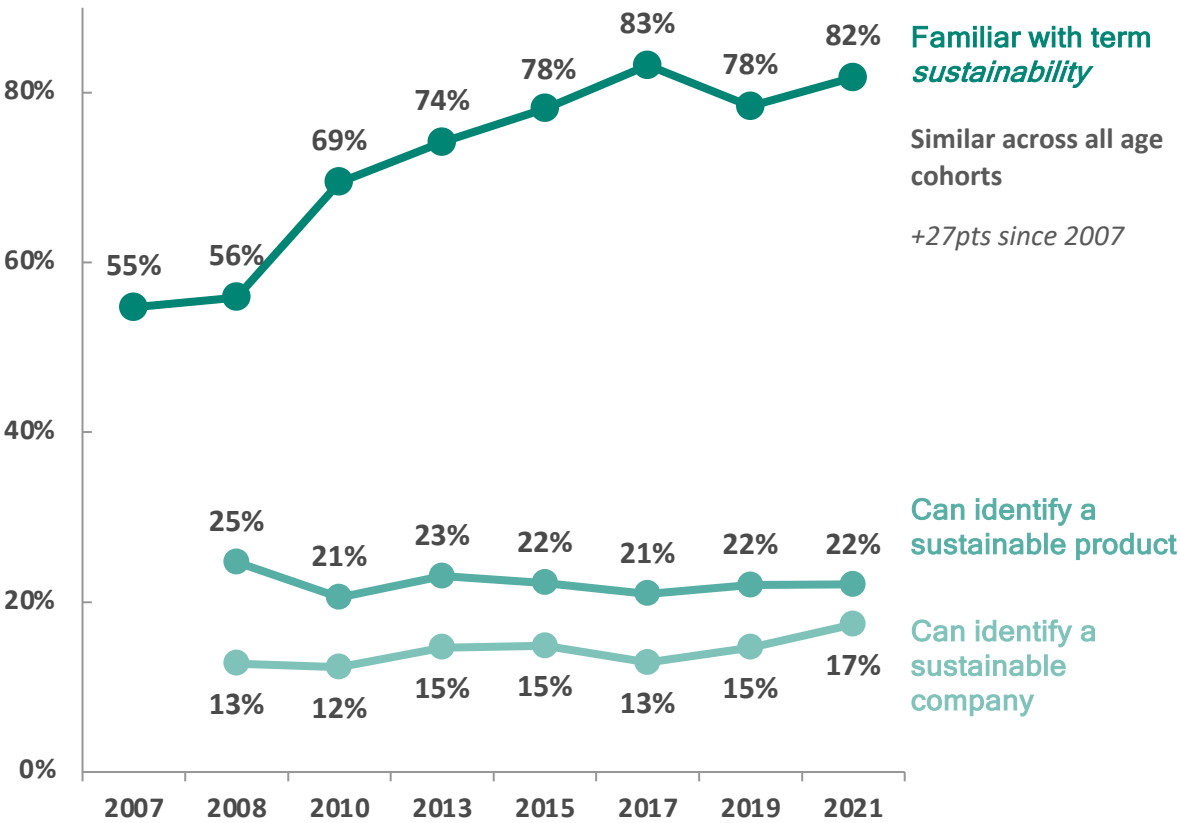
While consumer familiarity with the term “sustainability” has grown steadily in recent years, confidence in identifying sustainable products and companies has not kept pace

Self-reported familiarity with the term “sustainability” is up 1.5 times from 2007, yet most consumers remain unsure which products and companies support sustainability goals.

However, this may be less a reflection of stagnant knowledge and more a result of moving goalposts. As public understanding of environmental concerns grows more nuanced (e.g., familiarity with topics such as microplastics or coral reef bleaching), consumers may be finding it harder to navigate which products and companies best address each individual concern. A preponderance of sustainability-based marketing may also be testing consumers’ trust in which products and companies truly make a difference.

Familiarity with Sustainability and Sustainable Companies and Products

Among total



Q12. Are you familiar with the term "sustainability"? Trended base: Total 2021 n=2013, 2019 n=1622, 2017 n=1456, 2015 n=1779, 2013 n=1841, 2010 n=1982, 2008 n=1684, 2007 n=1459. Q14. How strongly do you agree or disagree with each of the following statements? (Select one response per statement) Trended base: Total 2021 n=2013, 2019 n=1622, 2017 n=1456, 2015 n=1779, 2013 n=1841, 2010 n=1982, 2008 n=1684, 2007 n=1459.

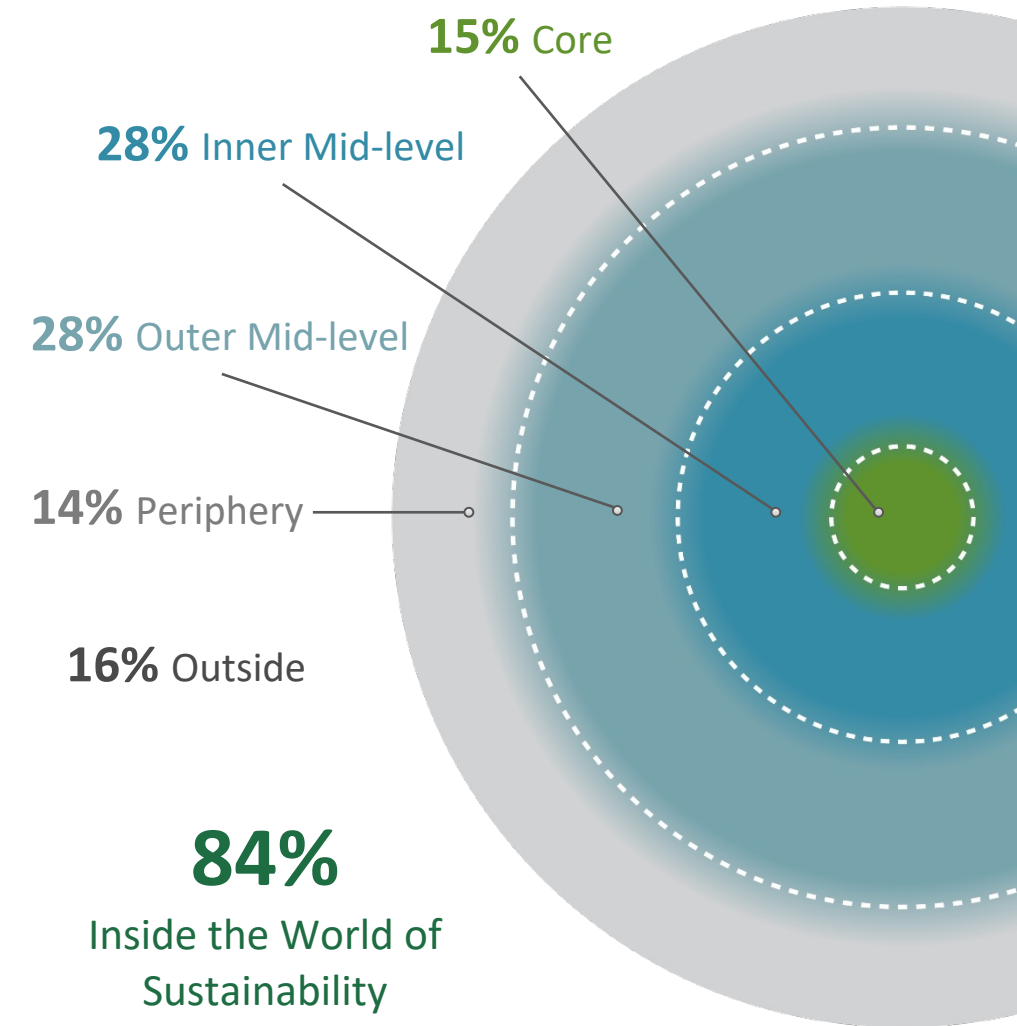
The Hartman Group's World of Sustainability segments consumers based on their level of engagement with sustainability, including both environmental and social components

Sustainability refers to an interconnected set of values, beliefs and attitudes tied to a sense of responsibility for the greater good over the long term. The World of Sustainability incorporates both environmental and social elements.

84% of consumers participate in sustainability in some way, acting on this sense of responsibility in their own lives, or at least wanting to. This classifies them as within the World of Sustainability. An individual consumer's position in the World indicates how deeply they engage with these matters.

- Core consumers are the most highly engaged with sustainability, holding the strongest attitudes, knowing the most about sustainability topics, and most frequently acting on their sustainability values and beliefs.
- Mid-level consumers adopt views and behaviors pioneered by the Core. They exhibit varying degrees of familiarity with and interest in sustainability issues and try to build sustainable habits into their lives but will not significantly alter their lifestyles for the sake of sustainability.
- Periphery are the least engaged, with limited knowledge about sustainability. While they may have aspirations around sustainability, their actual behavior often deprioritizes sustainability in favor of other concerns.
- Those outside the World tend to actively reject values and attitudes related to sustainability.

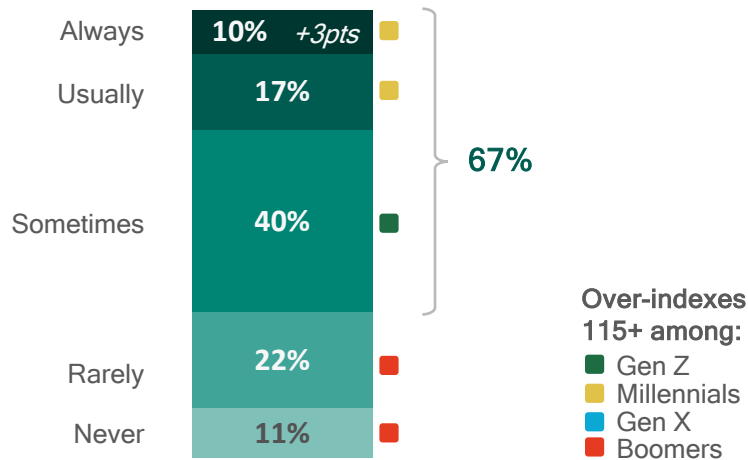
The Hartman Group's World of Sustainability Segmentation



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=2202.

Most consumers consider sustainability in their purchase decisions, and some make it a priority; still, considerations for one’s wallet and own needs typically win out

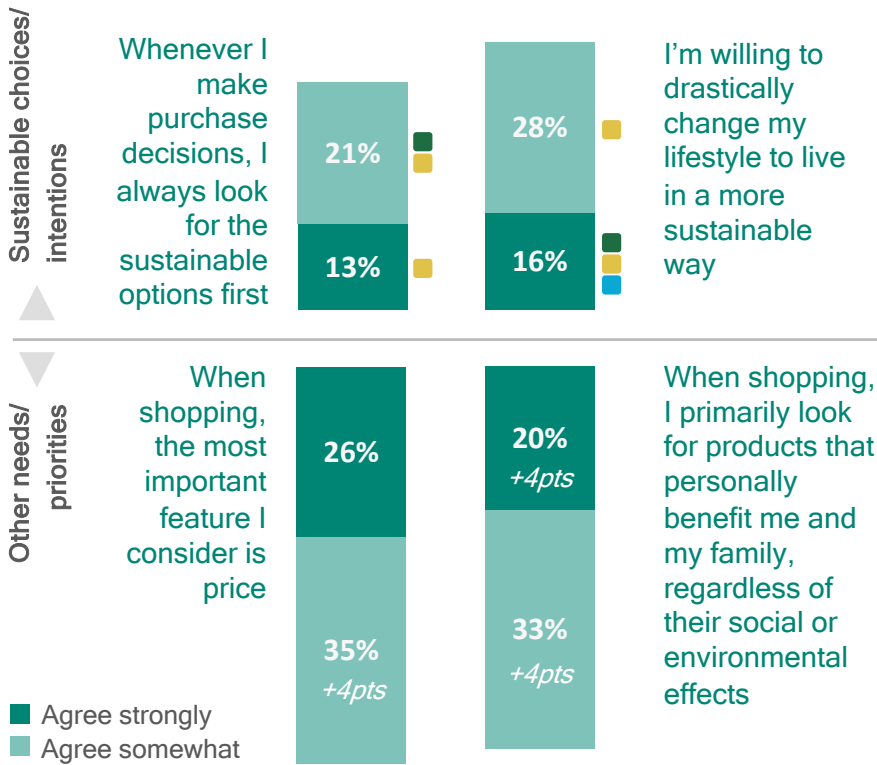
Frequency of Considering Sustainability in Purchasing
Among total, Trended from 2019



Two-thirds of consumers say they consider sustainability when shopping at least sometimes, with Millennials leading the way in doing so consistently. Gen Z consumers are equally likely to include sustainability in purchasing sometimes, but do not match Millennials in doing so more frequently (yet - likely due to their lower financial means at their current life stage). Boomers are the least likely to include sustainability in their purchase decision processes.

Q9. How often are your purchasing decisions based upon your concerns for issues such as the environment and social well-being? (Select one response) Base: Total n=2202, Gen Z n=480, Millennials n=526, Gen X n=555, Boomers n=641. Trended base: 2021 n=2013, 2019 n=1622.

Sustainable Choices vs. Other Priorities in Purchasing
Among total, Trended from 2019



Over one in ten consumers (and one in five Millennials) *strongly* agree that they always look for the sustainable version of a product they need. Similar numbers also strongly agree they are willing to make substantial changes in their lifestyles with sustainability in mind. But ultimately, higher numbers of consumers prioritize price and personal benefits over sustainability considerations.

Q14 and Q15. How strongly do you agree or disagree with the following statements? (One response per statement) Base: Total n=2202, Gen Z n=480, Millennials n=526, Gen X n=555, Boomers n=641.

Sustainability is one of many important considerations for consumers across categories, whether purchasing groceries or other household items, or choosing a restaurant

The following slides explore purchasing behaviors and motivations across a range of categories, including food and beverage, personal care, household cleaners, paper products and pet food. The chapter also explores how sustainability plays a role in selecting a retailer or a restaurant, both in-person and online.

Q15. Once again, please indicate how strongly you agree or disagree with the following statements. (Select one response per statement). Showing agree/strongly agree. Base: Total n=2202.

More than half of consumers say they try to limit how much they purchase to reduce waste and depletion of natural resources



SUSTAINABILITY ISSUES:
PACKAGING

Consumers often equate the sustainability of packaging to whether or not it is recyclable

The great expansion of e-commerce – including online grocery – in response to the COVID-19 pandemic has put consumers face-to-face with a pile of packaging. From shipping boxes that are too large for their contents to unnecessary plastics that consumers can’t recycle to simply too many packages at the doorstep, consumers have taken notice of both the amount and the wasteful nature of the packaging that arrives with the goods, including food, they purchase for delivery.

After protecting the product, recyclability is the most important packaging consideration. Even among consumers in the Periphery, the ability to recycle packaging is important to 44% and *very* important to 22%.

Many consumers admit that this consideration comes into play primarily at the moment of disposal rather than the time of purchase. Still, with recyclability important to a majority of consumers, it is worth making recyclable packaging a priority to ensure that consumers will continue purchasing a given product.

More sustainability-oriented consumers pay heightened attention to types of eco-friendly packaging, especially types made with recycled or biodegradable materials or renewable resources. An increasing percentage of consumers (nearly half of Core) want companies to rethink the need for packaging in the first place.

Q212. Still on the topic of packaging, how well do each of the following statements describe you? (Select one response per statement) Base: Total n=2202.Q61. When purchasing products, how important is it that its PACKAGING be...? (Select one response per type of packaging) Base: Total n=2202, Gen Z n=480, Millennials n=526, Gen X n=555, Boomers n=641; Core n=294, Periphery n=318.

67%

of consumers say they avoid products packaged in Styrofoam or other packages that they cannot reuse, recycle or compost

