



SUSTAINABILITY 2023: MAKING THINGS PERSONAL

A Hartman Group Syndicated Research Study

**Fielded July – September 2023
Market Coverage: U.S. Market**



**CONSUMER/
SHOPPER INSIGHTS**



**FORESIGHT
AND TRENDS**



**STRATEGIC
CONSULTING**



**INNOVATION
AND IDEATION**



Sustainability 2023 builds onto prior findings in The Hartman Group’s foundational Sustainability syndicated series. The report examines new sustainability-related considerations that have become important to consumers and provides key insights into what consumers are looking for now, what issues are emerging, and how to speak to consumers as the definition of sustainability evolves.

Report Published: September 2023

Report Length: 92 pages

Grounded in primary quantitative and qualitative research, the report offers a comprehensive consumer-based perspective on key topics, motivations and tensions associated with the evolution of ‘sustainability’ in the US.

What’s included?

- Executive summary
- Comprehensive report (PowerPoint and PDF) with in-depth, data-backed analysis
- Demographic data tables (Excel)
- Implications and recommendations

Key business questions answered:

- What language and terms resonate with consumers today?
 - Which claims do consumers really care about?
 - How do sustainability issues play out at shelf?
 - How to avoid greenwashing risks.
 - Where can your brand or company make the greatest impact?
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Methodology

- **Quantitative:** Online national survey July 19, 2023 – July 27, 2023, n=2165 U.S. residents aged 18-77. (MOE) ± 2.1 pts 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.
- **Qualitative:** Digital Ethnographies: N=16 participants. Week-long immersive engagement via asynchronous virtual platform.
- **Qualitative:** Follow-up In-depth Interviews, N=8 participants. Hour-long interview focused on delving into responses from digital ethnography.
- **Overview of topics:** meanings of sustainability, key concerns in sustainability, the good and bad of packaging, claims and certifications, the role of companies in sustainability, and social justice.



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Executive Summary

The report uncovers how consumer behavior and purchasing decisions fit into the broader picture of sustainability topics, including climate change, social justice, worker welfare, packaging, upcycling, shopping third-party certifications, and key trends in sustainability.

Chapter One: Introduction, Sustainability in Context

Consumers come at sustainability through a variety of entry points. The first chapter will cover these entry points as well as how consumers define sustainability.

- Consumers are more aware than ever of the need to act on climate change (analysis)
- Connecting with consumers requires understanding a change in concern having taken place about environmental and social issues in last few years (analysis)
- Reaching the correct consumer audience requires strategic targeting amongst the four sustainability domains (analysis)
- How to communicate the overlapping benefits of sustainability efforts to consumers (analysis)
- Unpacking the meaning of “sustainability” in US culture (analysis, chart)

Chapter Two: The World of Sustainability

The Hartman Group’s World of Sustainability allows manufacturers and retailers to better understand different segments of consumers. This chapter serves as a useful guide for understanding consumers’ engagement with sustainable practices, as well as their purchasing priorities for sustainable products.

- Sustainability World Model Segmentation (chart)
- Sustainability segments by demographic group (chart)
- Detailed overviews of each Core, Inner-Midlevel, Outer Mid-level, Periphery, and Outer segments (chart)



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Chapter Four: Packaging

Packaging cues sustainability for many consumers. This chapter explores packaging considerations and concerns while touching on the acceptance of bottle taxes and extended producer responsibility.

- Packaging as the most visible signifier of a company's sustainability efforts (data, analysis)
- How packaging considerations play out when purchasing products (chart)
- Role of packaging and recycling availability/options (analysis)
- Consumer perceptions of plastic packaging (data, analysis)
- Attitudes toward regulatory efforts and packaging (data, analysis)

Chapter Five: Purchasing Priorities in Sustainability

This chapter addresses consumer willingness to pay for products that contain different claims and/or certifications as well as general factors important when buying foods and beverages. Knowing which claims are recognized and valued will allow manufacturers to focus on sustainability issues consumers care about most.

- How frequently do consumers consider sustainable options when making purchase decisions? (data, analysis)
- What do consumers prioritize when considering purchasing sustainable options? (chart, analysis)
- Changes in purchasing sustainable products over the last two years- by age/segment (data, analysis)
- Barriers to purchasing sustainable products (chart, analysis)
- What are the key environmental and social well-being issues among food + beverage purchase considerations (chart, analysis)
- Consumer awareness and effectiveness of certifications (chart, analysis)
- Sustainability priorities when shopping for food + beverage (chart, analysis)
- Consumer willingness to pay more for a specific attribute (chart, analysis)



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Chapter Three: Key Topics in Sustainability

This chapter addresses how consumers understand the appropriate actions government and industry should be taking across established and trend-forward sustainability topics, from animal welfare and regenerative agriculture, to the link between health and sustainability. Included are the importance of these topics for the food and beverage industry in addressing challenges and leveraging future opportunities.

- Who is responsible for making the world more sustainable? (analysis, chart)
- Voting and societal impact (analysis, chart)
- Top issues to address have increased considerably since 2021 (chart)
- Who is most responsible to address top issues? (chart)
- Role of self-reliance and concerns about recycling in the US (data, analysis)
- Food waste and consumer attitudes (data, analysis)
- Consumer motivations for buying local (data, analysis)
- Consideration of animal welfare in food purchase decisions (data, analysis)
- Authentically communicating environmental benefits and avoiding greenwashing risks (data, analysis)
- Communicating sustainability efforts in the seafood category (data, analysis)
- Company transparency and consumer trust (chart)
- Trust in company sustainability claims (chart, analysis)
- Consumer perceptions on company ESG claims (chart)
- Consumption of animal products and the environment (data, analysis)
- Consumer perceptions on regenerative agriculture and soil health (chart, analysis)
- Consumer perceptions on labor practices within food and beverage companies (data, analysis)
- Consumer perceptions on carbon claims and offsets, (data, analysis)
- Connections between sustainability and health + wellness (analysis, data)



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Chapter Six: Considerations in CPG, Retailers, and Restaurants

This chapter explores what is important to consumers when shopping for a variety of products including personal care, household cleaning products, paper goods and pet food. It also explores priorities when shopping both in person and online shopping for groceries. Finally, it explores at restaurant usage and how sustainability plays a role.

- Most important attributes across household product categories (data, analysis)
- Purchase criteria for personal care products (chart, analysis)
- Purchase criteria for household cleaning products (chart, analysis)
- Purchase criteria for household paper products (chart, analysis)
- Purchase criteria for pet food, treats or snacks (chart, analysis)
- Sustainability consideration when shopping for food + beverage on-line vs. in-store (data, analysis)
- In-store grocery shopping criteria (chart, analysis)
- On-line grocery shopping criteria (chart, analysis)
- Criteria for choosing a restaurant (chart, analysis)
- Frequency of considering sustainability when choosing a restaurant (chart, analysis)

Chapter Seven: Findings and Recommendations

*Glossary of Terms:

Analysis: Skilled interpretation and translation of consumer culture.

Model: Hartman's proprietary model provides a framework for explaining how and why consumers make purchase/consumption decisions, thus helping brands navigate the consumer journey and ensuring relevancy within the marketplace.

Chart: Visual representation of quantitative survey responses, such as a bar chart.

Data: Specific data point(s) from quantitative survey used to highlight a compelling insight.



PRE-ORDER THE SUSTAINABILITY 2023: MAKING THINGS PERSONAL REPORT NOW

Report Price: \$12,500 (until October 31st, 2023. \$15,000 after November 1st, 2023.)

To purchase, fill out the form below and return by email to: Melissa@hartman-group.com

Melissa Abbott

Vice President, Syndicated Studies

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Sustainability Activation Session

Taking You From Insights to Action

A Sustainability Activation Session can be customized based on client input and starts with a kick-off call to discuss your organizational priorities and expectations for the session. This virtual session (3-4 hours in length) typically engages 5-25 client participants.

This Private Activation Session Offers:

- An independent perspective focused on identifying consumer demand opportunities and helping organizations pursue them.
- Insight into extending beyond the near-term interests of your current categories/brands to provide a long-term, strategic perspective that will enable your organization to think broadly about the future sustainability landscape.
- Generation of key platforms your organization needs to pursue to stay ahead of consumer expectations and meet their demands in an increasingly competitive landscape.

This Private Activation Session Delivers:

- High-level overview of key findings from *Sustainability 2023: Making Things Personal*.
- Facilitated brainstorming sessions (up to 4), each focused on one of the key sustainability topic areas in the report, designed specifically for your organization: (E.g., ESG, packaging, food waste, regenerative agriculture, animal welfare, labor practices)
- Summary of ideas/platforms developed in the Session, including Hartman Group analysis on which ideas/platforms are most likely to resonate with consumers, plus thought starters for further organizational development.

Fee:

\$20,000 for 2023 Sustainability report and activation session. Cost subject to change based on final scope of work.

If the report has been previously purchased, the cost of an Activation Session is \$7,500.