

## SUSTAINABILITY 2021: Environment and Society in Focus

Hartman Group Syndicated Study Published: September 30, 2021 | Report length: 118 | Market coverage: U.S. Market

**Consumer understanding of sustainability is growing, moving toward increasing sophistication in the links they see between a range of related issues.**



As we emerge from a year defined by a global pandemic and growing concerns around social justice, political turmoil, and climate change, previously abstract environmental and social well-being concerns are becoming increasingly more tangible.

***Sustainability 2021: Environment and Society in Focus***, part of The Hartman Group's foundational Sustainability syndicated study series, updates long-standing data sets and provides new insights on what sustainability means to consumers today, how they incorporate it into their everyday lives and prioritize it in their purchasing, how they think about specific sustainability topics (e.g., plastics and packaging, agricultural methods or social justice), and who should address these important societal challenges and how to address them.

### Methodology

- Integrated qualitative and quantitative methodologies.
- *Quantitative*: A nationally representative online survey of n=2,202 U.S. adults (aged 18–75), conducted July 16-29, 2021. Results weighted to age, gender, division, income, race/ethnicity and presence of children to match the 2021 Census Bureau Current Population Survey).
- *Mobile Qualitative*: 5-day asynchronous task assignment via specialized mobile app. All tasks were completed remotely due to COVID-19, and no participants were asked to visit a store or public area for safety reasons.
- *Virtual Interviews*: Consumers participated in 1-hour virtual interviews to contextualize assignment uploads and dig deeper into key topic areas.

### Report Package Includes:

- General report (PowerPoint and PDF)
- Executive summary
- Demographic data tables (Excel)

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- Implications and Recommendations

*Following is a detailed look at the contents of each chapter inside the **Sustainability 2021: Environment and Society in Focus** report.*

### Executive Summary: Topline Observations

- The past two years have accelerated consumers' growing understanding of sustainability and related issues.
- Consumers most engaged with sustainability — those who buy sustainable products and orient behaviors and attitudes around sustainability — are beginning to make connections between issues, developing a system-level view of sustainability more broadly.
- However, for the moment, the majority of consumers have a less nuanced grasp of the components of sustainability and their mutual relationships.
- The importance of sustainability considerations in consumer purchase decisions has been growing steadily over the years.
- Reasons for buying sustainable products change as understanding of sustainability grows.
- When shopping for foods and beverages, the majority take sustainability into account.
- Different sustainability considerations are prioritized in selecting where to shop for groceries online as compared to in person.
- Consumers articulate concerns about a range of environmental and social issues, many of which intersect.
- Companies are increasingly expected to take action on sustainability and even to proactively go beyond "doing no harm" to effect net positive change.

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### Chapter 1. Sustainability in a Shifting Context

- Change in concern about environmental and social issues since before the COVID-19 pandemic (chart)
- Consumers are closely following news of environmental catastrophes around the world and in their own backyards, making the threat of climate change more and more acute each year.
- The events of 2020 and 2021 have brought increased attention and nuance to social aspects of responsibility.
- Consumers perceive the pace and scale of sustainability-related events as having radically accelerated in recent years (timeline of key sustainability-related events chart).
- Familiarity with sustainability and sustainable companies and products (chart)
- The meaning of sustainability (chart)
- The meaning of sustainability over time (chart)
- Despite defaulting to defining sustainability in broad terms, many consumers have a more nuanced understanding of the topic.
- Consumers are beginning to see connections between a complex web of mutually connected environmental and social issues related to sustainability (language map chart).
- Social justice issues are important to consumers but for the moment are largely viewed as distinct from sustainability.
- Recent events have shifted consumer priorities and perspectives, putting sustainability into a new context.
- Chapter Summary: Sustainability in a Shifting Context

### Chapter 2. The World of Sustainability

- The Hartman Group's World of Sustainability segments consumers based on their level of engagement with sustainability, including both environmental and social components (segmentation chart)
- Sustainability segments by demographic group (chart)
- Reasons for buying sustainable products and who bears most responsibility for making the world more sustainable (charts)
- Deeper understanding of sustainability also translates to greater engagement with it for those closer to the Core (world model segmentation chart)
- Origination of trends and sustainable behaviors (chart)
- Segmentation profiles of Core, Inner Mid-level, Outer Mid-level, and Periphery consumers (percent of population, age cohorts, household income, gender, education, children in household, political orientation, and top-level purchase drivers)
- Chapter Summary: The World of Sustainability

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### Chapter 3. Sustainability in Purchasing

- Which has greatest impact on society (involvement in local community, purchase decisions, voting decisions)? (chart)
- Consumers who consistently base purchasing on sustainability (chart)
- Reasons that consumers purchase sustainable products (chart)
- Viewpoint on how consumers see the benefits of purchasing sustainable products.
- Adoption pathways by current level of interest in buying sustainable products (chart)
- Sustainability: action vs. aspiration gaps (chart)
- Sustainability: action vs aspiration gaps (age cohort comparison chart)
- Sustainability: action vs aspiration gaps (world model segmentation comparison chart)
- Frequency of considering sustainability in purchasing / Sustainable choices vs. other priorities in purchasing (charts)
- Barriers to purchasing sustainable products (chart)
- The ways sustainability figures into purchase decisions.
- Changes in purchasing sustainable products since before COVID-19 (world model segmentation and age cohorts chart)
- Chapter Summary: Sustainability in Purchasing

### Chapter 4. Sustainability in Grocery Retail, CPG & Food Service

- Sustainability is one of many important considerations for consumers across categories, whether purchasing groceries or other household items, or choosing a restaurant.
- Frequency of considering sustainability in store selection (chart)
- Criteria for store selection when grocery shopping IN PERSON (chart)
- Criteria for store selection when grocery shopping ONLINE (chart)
- Criteria for store selection when grocery shopping: Online vs. Brick and Mortar (chart)
- Frequency of considering sustainability in purchasing: foods and beverages vs. general purchasing (chart)
- Environmental and social well-being issues among food and beverage purchase considerations (chart)
- Sustainability priorities when shopping for foods and beverages (chart)
- Purchase criteria for personal care products (chart)
- Sustainability in personal care: benefits
- Purchase criteria for household cleaning products (chart)
- Sustainability in household cleaners: consumer viewpoints
- Purchase criteria for paper products (chart)

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- Sustainability in paper products: consumer viewpoints
- Purchase criteria for pet food, treats or snacks (chart)
- Sustainability in pet food: consumer preferences
- Criteria for restaurant selection when dining out (chart)
- Criteria for restaurant selection when ordering for takeout/delivery (chart)
- Sustainability at restaurants: consumer priorities
- Chapter Summary: Sustainability in Grocery Retail, CPG & Food Service

### Chapter 5. Key Issues in Sustainability

- Consumers are interested in a wide range of issues related to environmental sustainability and social responsibility.
- Sources of inspiration and information about sustainability (chart)
- Packaging considerations (chart)
- Sustainability issues: packaging recycling
- Sustainability issues: plastic and single-use plastic
- Sustainability issues: plastic & packaging innovation to reduce waste
- Sustainability issues: pollution & resources (continuum awareness vs. action)
- Sustainability issues: food waste — consumer connections
- Sustainability issues: food waste upcycling
- Sustainability issues: challenges of modern agriculture
- Most important aspects of regenerative farming (chart)
- Sustainability issues: agriculture and the interconnectedness of sustainability and health
- Sustainability issues: agriculture and plant-based alternatives
- Sustainability issues: animal welfare
- Important aspects of animal welfare (chart)
- Sustainability issues: accessibility
- Sustainability issues: food insecurity
- Sustainability issues: labor practices
- Sustainability issues: farmer livelihoods
- Sustainability issues: environmental justice
- Sustainability issues: social and racial justice
- Chapter Summary: Key Issues in Sustainability

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### Chapter 6. The Role of Companies in Sustainability

- Entities that bear the most responsibility for making our world more sustainable (chart)
- Issues companies and businesses should address (chart)
- Types of actions companies and businesses should take (chart)
- Actions consumers want to see: packaging, people, pollution
- Trust in company sustainability claims (chart)
- Corporate missions and communications: authenticity
- Claims and certifications: awareness and effectiveness of certifications (chart)
- Claims and certifications context: effect of Certified Plant-Based claim on purchase likelihood (chart)
- Claims and certifications: consumer engagement
- Claims and certifications: B Corp
- Sustainability and transparency
- Chapter Summary: The Role of Companies in Sustainability

### Implications and Recommendations (a sampling)

- Definitions of sustainability are becoming more nuanced.
- Sustainability is associated with quality, but it still is not always the top priority for consumers.
- Sustainability considerations enter into decisions about where to shop and what to buy.
- Sustainability tends to be less top of mind than several other priorities in food service, but it still has relevance.

### A VALUED RESOURCE

This report is a continuation of The Hartman Group's series of syndicated research reports in the intersecting market spaces of health & wellness, sustainability, and organic & natural.

From our trademark integration of rich qualitative and robust quantitative research methodologies to expert analysis, The Hartman Group offers our clients an unparalleled understanding of consumers, culture, trends, and categories as the foundation for confident, informed decision-making, inspiration, and identifying opportunities for growth. Each report provides in-depth analysis and thought-provoking insight backed by a range of data.

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