



Sustainability Exploration

Exploratory Research Group™





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Background & Objectives

Background & Objectives

A leader in the CPG category is interested in exploring how consumers think and talk about sustainability to help guide their creation of effective marketing and packaging taglines. Specifically, the client seeks to understand how consumers think about water conservation, recycling/waste, and sustainable sourcing.

The client will use the findings from the exploratory qualitative phase of research to inform the direction and content of a quantitative study to test out taglines on a potential new product. This research will focus on understanding how consumers think about sustainable products and specific sustainability issues. The findings will be used to develop effective taglines to be used in product marketing/packaging.

Key Question

What words and phrases should we incorporate into our tagline for our new sustainable product?

Research Objectives

- Explore what consumers think of sustainable products in general
- Discover expectations around how they identify a product as sustainable
- Explore words and phrases they use to think about water conservation, recycling/waste, and sustainable sourcing
- Generate taglines or phrases around these issues



Methodology

Methodology

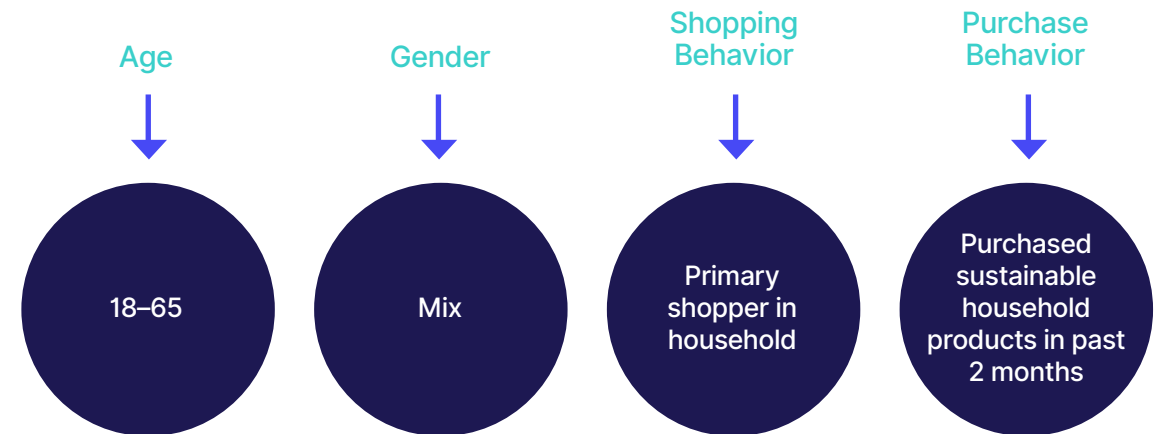
Exploratory Research Group™

This study was conducted via an online Exploratory Research Group where respondents answered open-ended questions and follow-ups posted by a trained moderator. This technology fosters a dynamic qualitative discussion where respondents are easily able to interact with others in the group.

Qualitative research is based on a small number of individuals and provides a rich source of information useful in understanding a given subject matter or population, in confirming existing knowledge or suppositions, and in providing direction for planning and strategy. Caution should be used in generalizing the findings to a larger population.

Research Method	# of Groups	Total Respondents	Days in Field	Recruit to Report (in days)
ERG™	1	25	3	7

Audience





Executive Summary

Executive Summary

Key Findings	Implications
Sustainability is seen as providing environmental benefits as well as holistic societal benefits	Respondents felt that sustainable products are produced in a way that does not harm the environment, and in ways which benefit society as a whole.
Product sustainability is typically evaluated by packaging; averse indicators include excessive packaging and long ingredient lists	<ul style="list-style-type: none">• In some cases, respondents also relied on word of mouth and Internet research to evaluate sustainability.• Many respondents would not purchase products with excessive packaging regardless of eco-friendly claims.
Awareness of claims is high, but these claims often become intermingled in consumers minds	<ul style="list-style-type: none">• Respondents found it hard to keep track of eco-friendly seals, claims, and buzzwords. They often confused terms with each other.• Many respondents felt that these terms were so hard to define that they have all become meaningless.
Rather than specific claims or terms, many consumers would like to see short, simple explanations about how products are sustainable	<ul style="list-style-type: none">• Respondents wanted short and simple yet holistic explanations of how a product was produced in a sustainable way, rather than specific terms or phrases that are often confusing to them.• They wanted percentages and anecdotal data to help them understand how sustainable the product is.

Executive Summary

Implications

Avoid excess packaging and buzzwords on packaging, as these are often aversive indicators to consumers interested in eco-friendly products. To help reduce the negative impact of long ingredient lists on consumer perceptions, consider adding a line of copy certifying that ingredients are sustainably sourced and free from harmful or toxic materials.

Many sustainability terms are confusing and interchangeable to consumers; use a holistic yet simple explanation of sustainability on product packaging to make it easy for them to understand how products are sustainable and eco-friendly. Respondents wanted to see clear explanations of how the product was eco-friendly rather than vague claims or terms which they were skeptical of and found hard to validate.

To help counteract skepticism many consumers have about eco-friendly claims, use percentages and data to help provide evidence of how sustainable a product is. For example, explain what percentage of ingredients are sustainable or made from recycled materials.

Consider using a humanistic voice to appeal to the ethical and social reasons why consumers support sustainable products. Respondents wanted to see that companies were like-minded in their respect for the environment.



Detailed Findings

Perceptions of Sustainable Products

Sustainable products are seen as being environmentally friendly as well as beneficial

- Respondents felt that sustainable products were those that were environmentally friendly, decompose easily, have a limited carbon footprint, and use renewable resources.
 - These products are seen as having high-quality, wholesome ingredients
- Many also believed that sustainable products provide social and economic benefits, especially around public health and the environment.
- Respondents generally preferred to buy sustainable products, but their level of commitment differed based on the category, cost, and efficacy of the product. For many respondents, sustainability was one factor among many in a purchase decision.
 - Affordability was ultimately more important than sustainability
 - Some were worried about efficacy of cleaning products in particular; meanwhile, a mother with a toddler was more likely to use sustainable products for cleaning

“

Honestly it depends on price, if the price difference isn't too much higher I will choose the sustainable product. But it has to still be affordable.

Female
Age 27



“

Sustainability influences my decisions on what I will and will not purchase; if a product is packaged with too much material, I am much less likely to purchase it.

Female
Age 41

“

It depends on what type of product it is. I'm looking for different things if it's a cleaning product vs. a food product. Cleaning—it must work as well as the non-sustainable product. Food? it's ok if it's a bit more expensive but claims must be observable and measurable.

Female
Age 51

“

I would prefer it since I am environmentally conscious but cost does come into play.

Male
Age 54



Sustainable Brands Drive Awareness

Awareness of sustainability is mixed between brands and other general initiatives

- Some respondents brought up Seventh Generation, Method, Mrs. Meyers, Peet's, and Burt's Bees as examples of sustainable brands.
- Others also mentioned Whole Foods, Organic Valley, CFA boxes, and local farmers markets as good sources of sustainable products.
- Some respondents brought up Green Works, while others were skeptical about how sustainable its products were.
- Many were more aware of general sustainability programs, such as plastic bag bans or recycling programs, but did not associate these with specific brands or products.
- Many respondents did not differentiate between sustainability and other somewhat similar words, such as "organic."

“

Seventh Generation because they make products that are eco-friendly. Burt's Bees because their products are natural and they put in a lot of work to ensure that the products they do not cause harm to the environment.

Female
Age 33

“

Local farmer's market. Whole Foods, Trader Joe's, Mrs. Meyers, Burt's Bees

Female
Age 51

“

I buy Mrs. Myers and Green Works products. I recycle all I can and look for products that have less packaging. Amazon has many options to order products with less packaging.

Female
Age 47

“

I use Method and Mrs. Meyers products to clean and wash dishes, hands, etc. I do avoid fast fashion, and know that there are programs to reduce the toxicity of raising crops, there is more labeling that goes beyond the useless “natural” to actually show what is involved. I love that Whole Foods often shows which farmer raised the local produce it offers, and has begun that with poultry and meat.

Female
Age 27

“

I like products like Seventh Generation laundry or cleaning products for example. We use these products and have for several years.

Male
Age 39



Packaging Acts As A Signal

Respondents typically identified eco-friendly brands by their packaging

- Most respondents looked to packaging to determine which brands were eco-friendly.
 - Labels, seals, and the color green were helpful in quick identification
 - Some mentioned that they expected eco-friendly products to be clearly labeled
- Excess packaging was mentioned as an easy way to identify brands which are not eco-friendly.
- Some mentioned word of mouth and Internet research as good sources of information.
- Some respondents were also skeptical of eco-friendly claims made by companies, and found it difficult to verify or evaluate these claims. These respondents were also confused by vague eco-friendly labeling, although some other respondents found these labels helpful.

“

Sometimes it's obvious like you know the product with the extra packaging isn't. Often it's written on the package, but I have no idea whether that's trustworthy.

Female
Age 60



Overselling Is A Deterrent

Averse indicators included excessive packaging, long ingredient lists, and sustainability buzzwords

- Respondents were very skeptical of products with excess packaging; they felt this was an easy way to identify products which were not produced sustainably. Many actively avoided purchasing any products with what they felt was excessive packaging.
- Respondents also associated long ingredient lists with potentially harmful chemicals and felt these were less likely to be eco-friendly.
- While many respondents found eco-friendly labels and sustainability buzzwords helpful, many others found them confusing and often meaningless. For the latter group, these buzzwords were averse indicators.

“

I can tell a product is not interested in sustainability when there is excess, unnecessary packaging, a lot of chemicals in the ingredient lists, and by reading online blogs about brands.

Female
Age 41

“

A non-sustainable product is often heavy on packaging, and then there is the list of ingredients-unpronounceable and silly long.

Female
Age 27

“

I see companies use words like environmentally friendly, GMO-free, no hormones, fair trade, free trade, renewable. It can be hard to know what each term means, especially when many of the words or phrases can be used interchangeably or can have a different meaning depending on the company using it.

Female

Age 37

Awareness Is High

Awareness of sustainability claims are high, but consumers are skeptical of many certifications

- While some respondents mentioned they hadn't seen advertising for sustainable claims before, most were familiar with common sustainability labels in the marketplace, such as fair trade, organic, natural, GMO-free, and recyclable.
- Skepticism of these claims was high among some respondents, who were unsure of how many of these claims were defined or how the companies concerned were evaluated.
- Packaging, statistics on sustainability, and independent 3rd party certification were all important in helping respondents evaluate the claims made by brands.
- Given confusion around labeling, using clear, simple, and easy-to-understand terms with holistic explanations around sustainability would likely be helpful to respondents.

“

Fair trade, organic, GMO free, all natural, recyclable, made with recycled materials, all natural.

Female
Age 37

“

I've heard companies say that their products are 'all natural' or 'safe for the environment' or they call themselves 'green'.

Female
Age 37

“

So many badges in green and white that mean less than nothing. Fair trade is my favorite. In the last year fist fights have broken out at international gatherings to discuss what it means...nobody really knows.

Male
Age 56



Sourcing Is Important

Sustainable sourcing was the most important eco-friendly attribute to respondents

- Respondents generally felt that all points listed were important (others listed: production waste made by the factory, water conservation made by the producer, eco-friendly packaging).
- Sustainable sourcing was important because of ingredients; many respondents felt that the product itself must be made from sustainable ingredients above all else.
- Production waste and eco-friendly packaging were also important
 - Some consumers are unable to recycle or recognize that others are unwilling to recycle, and find eco-friendly packaging especially important
 - Consumers recognized that products with sustainable ingredients must not have excessive production waste in order to be truly sustainable
 - Water conservation was not as important to most respondents

“

This was really a tough decision to make because all of the points are important. I ultimately decided “production waste made by the factory” was one I could give a vivid description of. There has got to be a better way to control the waste of everyone, including households and industry.

Female
Age 55

“

They can NOT use an ingredient that is finite in supply and recycled materials are important because then it would just be taking things indefinitely to make a product and nothing to replenish the supply.

Female
Age 24

“

I chose this (production waste) because I feel it is one of if not the biggest offender of damage to the environment. So many factories dump their waste into nearby rivers or oceans it is causing problems and will continue to do so until stopped.

Male
Age 39

“

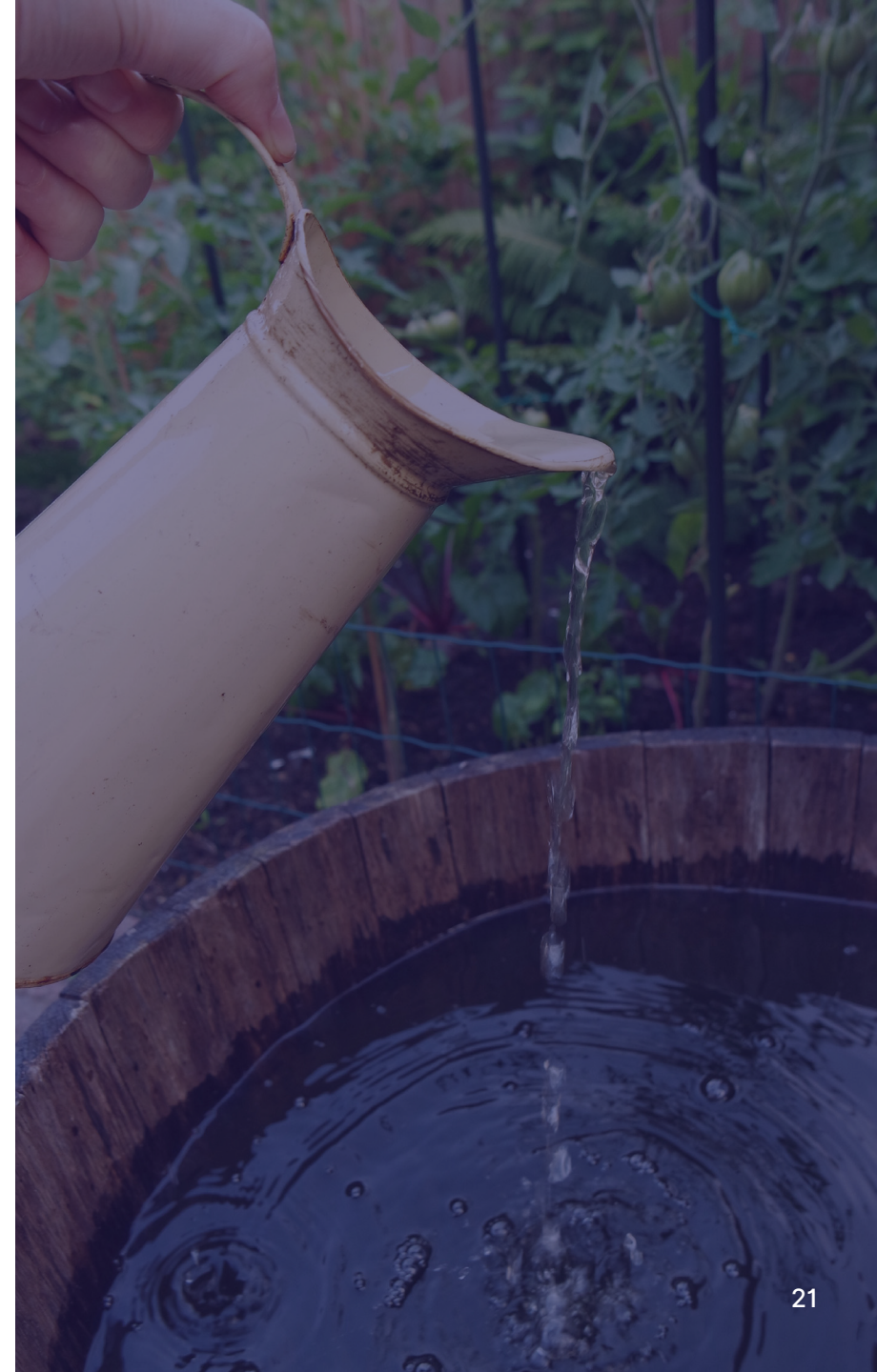
People can't always recycle, so the packaging needs to be eco-friendly.

Female
Age 38

Conserving Water Prevents Drought

Respondents associated water conservation with general drought prevention practices rather than specific terms

- Others associated water conservation with the production process for household products, through maintenance of clean water sources in nature and sustainable water use.
 - Recycled water, efficient water use, and saving run-off water were mentioned
 - Respondents also brought up irrigation methods used for producing foods, and advocated for drip irrigation use
- For many respondents, water conservation was associated with using less water in their own households by fixing leaky faucets and turning the water off while brushing teeth.
- During the tagline exercise, most respondents used the term “water conservation,” and related it to drought prevention efforts in general rather than other specific terms.
 - Respondents found claims difficult to validate, and preferred to see clear explanations of how the product helped conserve water
 - Some respondents wanted to see percentages and data rather than any specific terms



Water Conservation Elements

Respondents came up with taglines/package elements to promote a product with good water conservation practices

“

In making this product, we use an average of 25% less water than our competitors—that's enough to fill 1,000 Olympic-sized swimming pools every single day!

Female
Age 41

“

Using a (percentage) of re-claimed water. Only using biodegradable additives. “We acknowledge that all of us on this planet need to use water responsibly. To further this end, in (year) we used (percentage) less water than in (year).”

Female
Age 51

“

All of our products contain 100% fresh water. It has all been tested to our abilities and we are proud to put our stamp on our product. Enjoy..

Female
Age 55

“

Water saver certified, with an explanation of what process was used to save water in the making of the product.

Female
Age 37

Recycling Should Be Explicit

Respondents associated a few terms with recycling, but preferred to see percentages

- Respondents associated terms including “waste,” “waste reduction,” “reduce-reuse-recycle,” and “biodegradable” with recycling.
- Many respondents wanted to see what percentage of each package was made with recyclable materials.
- The recycling icon was useful in helping respondents evaluate whether they could recycle the package after using it, which was another important consideration.

“

I would show on the label how much of the product was made with recycled goods. I might also show how much of it can be recycled/reclaimed again.

Female
Age 33



RECYCLE

Recycling Elements

Respondents came up with taglines/package elements to promote a product with good recycling / waste practices

“

Recycle = everything used
can be new again.

Waste = what cannot
be reused.

So what I would do for
labeling is list something like
made from 90% recycled
material, with only
10% waste!

Female
Age 37

“

Recycling ... conserving
materials, salvaging usable
parts for reuse, minimizing
excess packaging.

Female
Age 27

“

Using terms in the tagline
that are concrete (observable
and measurable) more often
makes me pay attention
rather than a vague term like
all natural or sustainable. So
“last year we recycled enough
(product) to fill up the Empire
State building 4 times...”

Female
Age 41

“

When you hold this box in
your hands, you are holding
2 pounds of paperboard that
you've recycled! We use less
in our packaging, so there
is less waste, and 100% of
our packaging comes from
people like you, who recycle
packaging after you're done!

Female
Age 51



Appendix

Appendix A: Respondent Profile

Gender	
Male	20
Female	5

Age	
22	1
24	1
27	1
28	2
30	1
33	1
34	1
37	2
38	1
39	1
41	2
44	1
47	1
49	1
51	1
54	2
55	2
56	1
60	1
62	1

Household Income	
\$0 to \$19,999	2
\$20,000 to \$29,999	2
\$30,000 to \$39,999	4
\$40,000 to \$49,999	2
\$50,000 to \$59,999	3
\$60,000 to \$69,999	2
\$70,000 to \$79,999	3
\$90,000 to \$99,999	3
\$110,000 to \$119,999	1
\$120,000 to \$129,999	2

Appendix: Polling Questions

Primary Shopper	
I am fully responsible	21
I am mostly responsible	4
I share responsibility about half of the time	0
Someone else is mostly responsible	0
Someone else is fully responsible	0

Items Purchased	
Eco-friendly / green / sustainable household products	22
Eco-friendly / green / sustainable personal care products	17
Eco-friendly / green / sustainable grooming products	14
Sustainably sourced food products	23
None of the above	0

(Q14) Attribute Importance (Objective 3)	
<i>Of the following sustainable features, which is most important to you? Please be sure to also explain WHY that feature is the most important to you!</i>	
Eco-friendly / green / sustainable household products	22
Eco-friendly / green / sustainable personal care products	17
Eco-friendly / green / sustainable grooming products	14
Sustainably sourced food products	23
None of the above	0