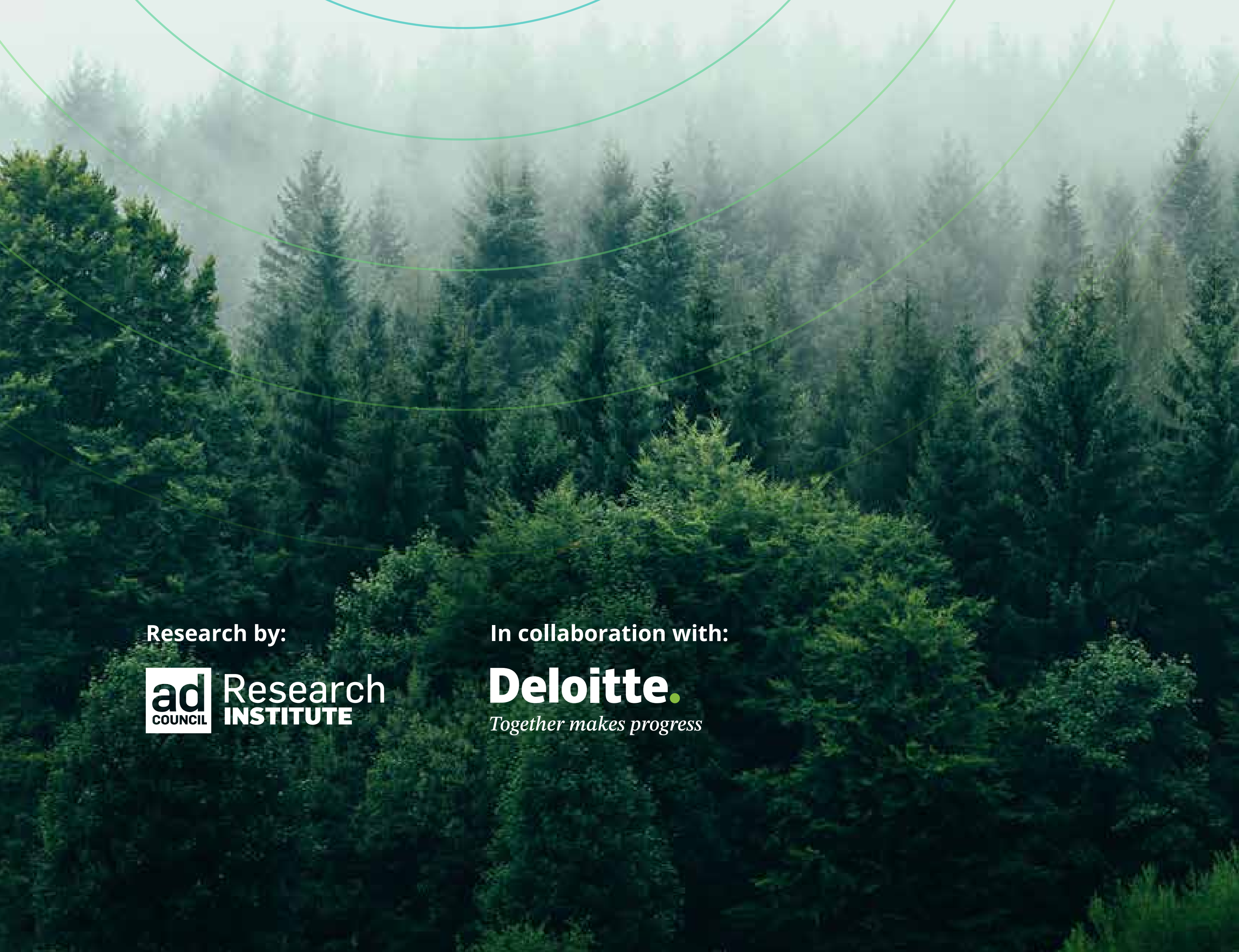
Unpacking the Sustainability Dilemma:

How Consumer Values Become Choices



Research by:

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In collaboration with:

Deloitte.

Together makes progress

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Executive Summary

Recent polls show the majority of Americans prioritize environmentally-friendly efforts and sustainability as a whole. But when it comes down to actually *doing* something in favor of sustainability, do their actions align with their beliefs?

This study, consisting of mixed-methods research with over 5,000 U.S. adults, sought to understand if consumer purchase intent aligns with their behavior—and what brands can do to increase both awareness and purchases of sustainable food items with shoppers across the country. This study consisted of three research phases: a review of ConvergeCONSUMER Shopper Card Data from March 15, 2024 - March 15, 2025 by one of the largest U.S. retailers, a two-day online qualitative discussion board conducted April 2-3, 2025 and a quantitative survey conducted May 12 - June 1, 2025. Primary findings from this study included:

1. There is still a "me" in "consu*me*r."
When buying food, consumers often optimize first for their own self-interest. The personal impact of purchases (taste, value, quality) was rated materially higher than sustainability in purchase decisions. Sustainability seemed to be most desired when it was also linked to the personal health of the buyer and her/his family.

2. "Sustainability" is in the eye of the consumer.
When defining sustainability, consumers most want to hear how the product (or process) minimizes negative effects and provides benefits to people, communities, and the planet—and they want specifics.

The terms that consumers most associate with sustainability are "best option for the environment" and "eco-friendly," followed by terms like "natural ingredients," "carbon neutral certified," and "organic." Conversely, many consumers did not consider attributes like taste, value, quality, and price, or company characteristics (ownership, company size) as signals for sustainability.

3. The say-do gap is… sustaining.
The significant gap between consumers' stated purchase intent and actual purchase behavior continues. Many consumers are buying sustainable food, but only for some food categories, and only slightly more than in previous years. Those who are buying more sustainable food items are mainly doing so for health reasons; those who aren't are often restricted by price. Because of this, brands should consider leading with a product's impact on personal health, the environment, and their wallets (i.e., value).

4. For consumers, it's (still) price, price, price.
It can't be said enough: Price continues to be a primary hurdle that brands will have to overcome when marketing sustainable food products to consumers. Lower-priced items more often win out when consumers are in the store, even when a trusted brand is in the equation.

Overall, product pricing remains a critical decision metric. While consumers understand the benefits of and feel generally positive toward sustainability, high prices are still a hurdle for many and will drive purchase decisions for most over brand or environmental factors. Offering coupons or promotions to bring prices closer to non-sustainable options may motivate consumers to buy, though with an important caveat: Shoppers do not associate cheaper prices with sustainability, so excessively dropping prices can be viewed with skepticism by some.

5. Trust is the new currency.
Trust is not an ethereal concept. Rather, it's a currency of exchange in the sustainability economy. Consumers are likely to spend more when they can trust the brand and what it stands for, and if the brand has illustrated a commitment to real change.

The most important actions brands can use to engender trust include:

- Investing in producing products that are sustainable
- Committing to sustainability efforts over a long period of time
- Building a commitment to sustainability into their company's values

These actions were much more important than donating or partnering with experts, other organizations, or influencers in the space.

Additionally, consumers tended to be wary of national/large brands, rating smaller, niche brands/companies as being more trusted. However, several of the "small brands" cited in the qualitative phase of the survey as being "trusted" were actually sub-brands of multi-nationals, signaling that perhaps nurturing an independent image for sub-brands could be a beneficial strategy for multi-nationals.

6. You catch more consumers with honey than vinegar.
To attract consumers, brands should encourage them to take actions that will lead to desired benefits of sustainability without blaming or scolding. Messaging should be focused on the positive outcomes of buying sustainable, particularly how it impacts the individual through money savings and health/wellbeing for self and family. Conversely, respondents overall didn't like being told pedantically *how* to be sustainable. Many indicated they are open to widely practicing environmentally friendly behaviors (think reusing containers and donating used goods), but specific or niche actions and products (gardening/composting, bamboo toothbrushes, menstrual cups) did not perform well. When crafting messaging, brands should consider highlighting the benefits and sharing accessible ways to be more sustainable without reprimanding consumers.

Introduction

There are a number of positive benefits of sustainable purchases and sustainable living: decreased air and water pollution; less waste disposal and toxic exposures; less of an impact on the environment; long-term benefits for the health and wellbeing for us and our families.

And many US consumers agree: In fact, a 2024 Pew survey found the majority of Americans prioritize renewable energy and support the goal of the U.S. taking steps to become carbon neutral by 2050.

But when it comes down to actually *doing* something in favor of sustainability, how do individual consumers' actions align with their beliefs?

It seems they do in part, as seen in a recent survey from GlobeScan where nearly half (49%) of U.S. consumers reported purchasing an environmentally friendly product in March 2025 (up from 43% in August 2024). A further third of respondents wanted to buy a sustainable product but were hindered by factors like price, limited awareness, and lack of availability.

While consumers may want to purchase sustainable food items, **many are constrained by real-world scenarios—most commonly related to pricing—**that consumers have no control over. While inflation continues to play a part in the U.S., grocery prices remain high. In fact, food prices have increased 20-30% from 2019 to 2025, a percentage that massively affects consumer wallets and collective spending power.

When higher prices reign supreme, it's already a challenge for brands and sustainable companies to be in the forefront of consumers' minds and become prioritized at the grocery store. What labels or certifications signal to a consumer that a product is considered sustainable? In today's economic climate, can personal and environment impacts ever outweigh pricing to the American shopper? And how can brands close the gap between *purchase intent* and *actual purchase behavior* when it comes to buying sustainable items?

Purpose

The Ad Council Research Institute (ACRI) collaborated with Deloitte U.S. Sustainability to better understand the knowledge, attitudes, and behaviors of U.S. consumers on sustainability and sustainable products, and test and optimize key messages and frames to develop effective strategies for brands to communicate such efforts.

In this study, ACRI conducted mixed-methods research to:

- **Determine if/how consumers buy sustainable products,** and important factors in the purchase decision.
- **Discover what terms, certifications, and descriptors signal "sustainable" to customers**, and how those differ by key demographic or behavior segment.
- **Identify effective strategies for brands** to communicate their sustainability products, initiatives, and values directly to consumers.
- **Inform communication efforts** to persuade American consumers to purchase sustainable products.

The findings in this report provide a deeper look into how consumers think and feel about sustainable goods/products, and how to best develop messaging to build understanding and motivate them to switch to such products.

Findings

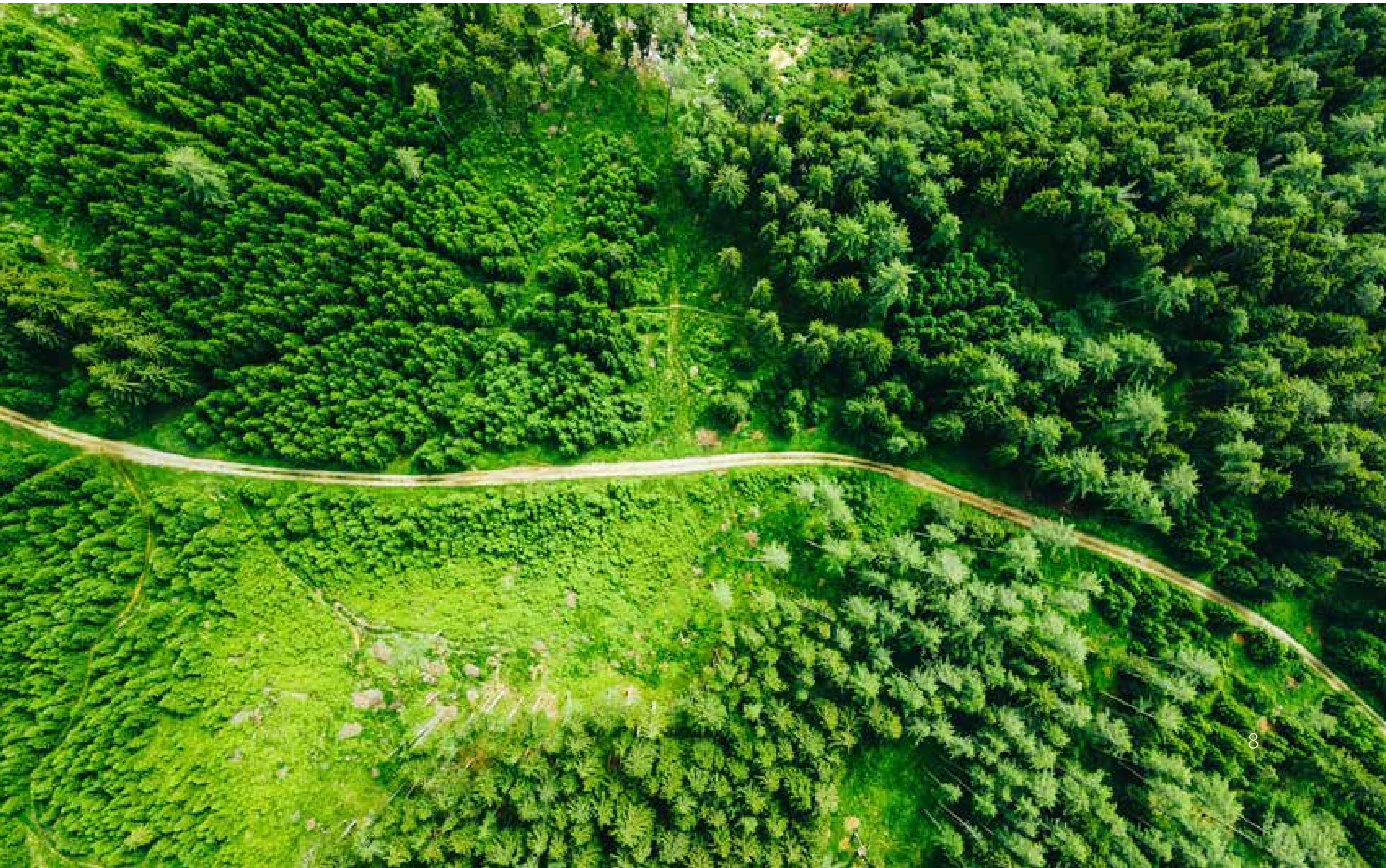
This study examined six key areas related to consumer beliefs and habits regarding sustainable food purchases, which are summarized as follows:

- There's still a "me" in "consumer."
- Sustainability is in the eye of the consumer.
- The say-do gap is … sustaining.
- For consumers, it's (still) price, price, price.
- Trust is the new currency.
- You can catch more consumers with honey than vinegar.

Throughout the report, any differences by segment or other demographic group are noted if they meet or exceed any of the following:

- Sample, cohort, and/or subject population size reflects an N>200
- Over/under index data points reported reflect the following:
    - Greater than 10% due to sample size and response proportionality
    - 5% variance (greater than or less than) from the total sample

If there is no mention of such differences, any data points or findings did not meet these thresholds.



SECTION 1

There's still a "me" in "consumer."

When shoppers are in the store, what motivates them to purchase one item over another? What is behind consumers' purchase intentions and actions, and where does sustainability come in? At the outset of the quantitative survey, respondents were asked to rate how important various factors are on their decision to buy grocery products.

Taste, value, quality > sustainability.

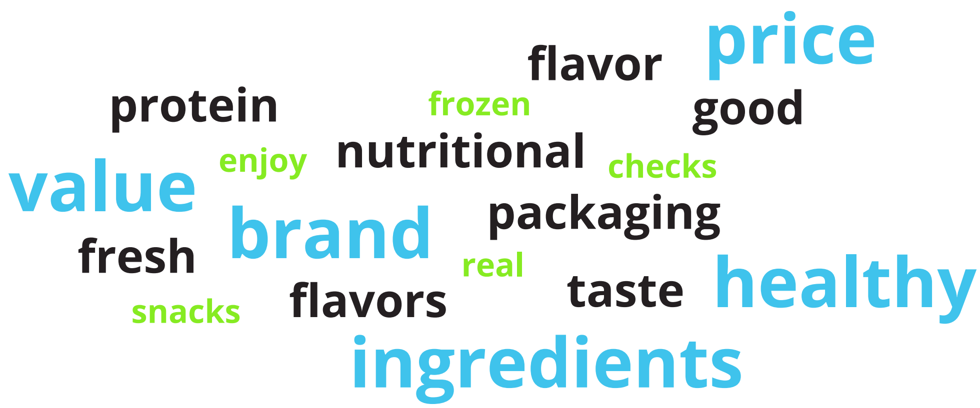
What drives shoppers to go from shelf to cart? Taste (89%), value (89%), quality (85%), and flavor (85%) win out, followed by “best option for my health” (75%) and items from a trusted brand (75%). So, what role does sustainability play? When it comes to driving purchases in general, it’s further down on the list—chosen by about half of total respondents (54%), though a definition of sustainability wasn’t supplied for this question.

While the top drivers of grocery purchases were consistent across demographic groups, sustainability was slightly more important for three segments: Sustainability Conscious (70%), Values (88%), and Health (64%).

Qualitative participants cited similar factors when choosing products, most frequently **ingredients, brand, value, healthy,** and **price.**

Qualitative Participants: Purchase Drivers

Word cloud based on frequency of responses



The 54% of shoppers who rated sustainability as important were most likely to attribute[1] these products as being good for the environment/planet (41%), lasting longer (17%), and being good for the future (12%).

> **"Sustainability for the environment is very important for longevity. We want to protect the environment and not degrade it if possible."**
> - Millennial woman, Sustainability Neutral

> **"Sustainability ensures that the products will be around for the next generation."**
> - Boomer man, Sustainability Neutral

Those who rated sustainability as *not* important were most likely to comment[2] that it's because they don't think about it or care (35%), or because of the belief that sustainable products usually cost more (18%). A further 16% were unfamiliar with the term "sustainability."

> **"I don't put much effort in deciding what I get; I kind of just pick what is there that looks good."**
> - Gen Z man, Sustainability Neutral

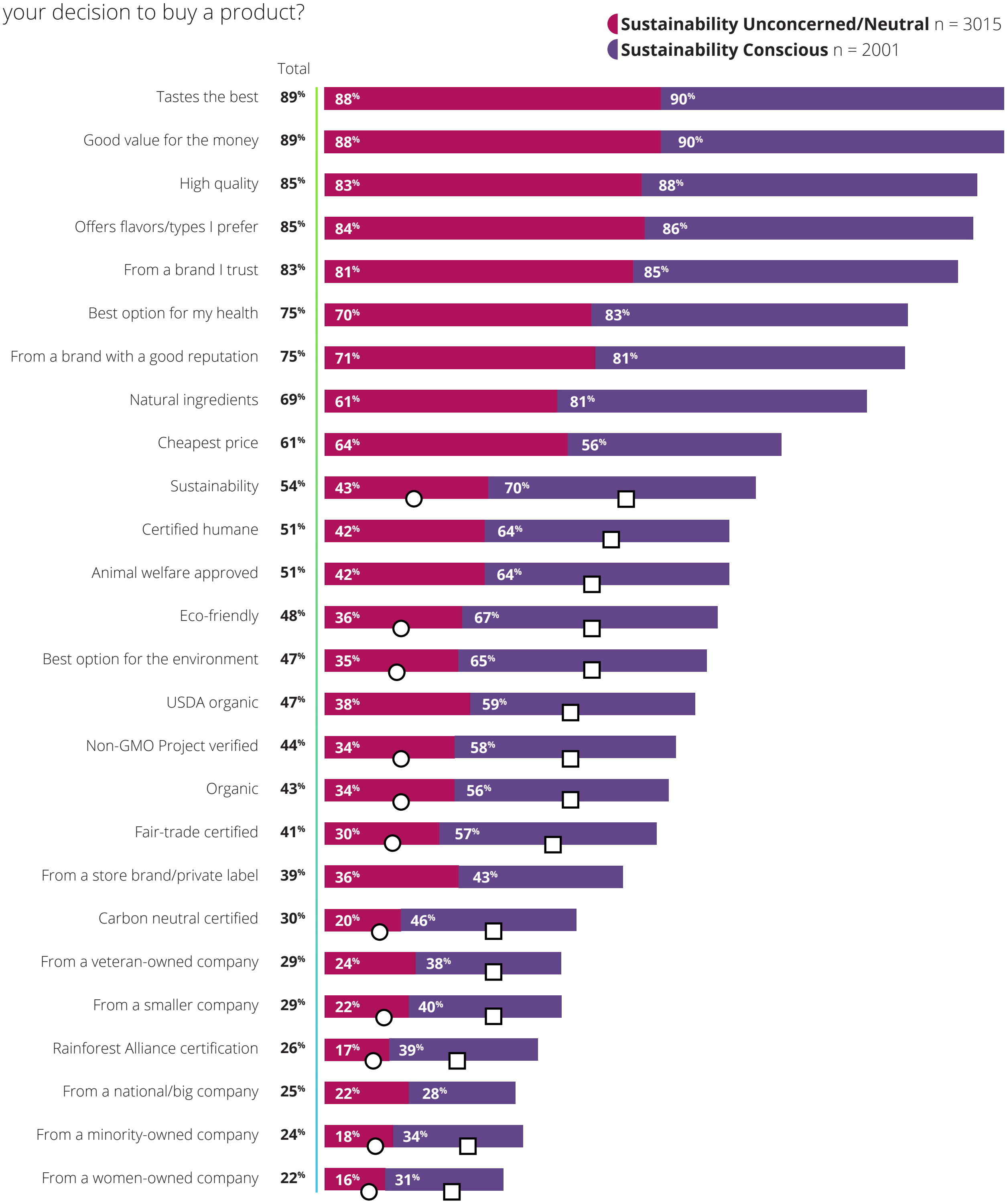
> **"I can barely afford grocery prices. I can't be picky about sustainability."**
> - Gen X woman, Sustainability Neutral

> **"I just don't fully comprehend what that means."**
> - Boomer woman, Sustainability Neutral

1. This question was open-ended; responses were coded for most prevalent themes.
2. This question was open-ended; responses were coded for most prevalent themes.

Purchase Drivers % Very/Somewhat important **(sustainability segments)**

Thinking about shopping for your grocery items (dairy, meats, eggs, bread, etc.), how important are each of the following in your decision to buy a product?



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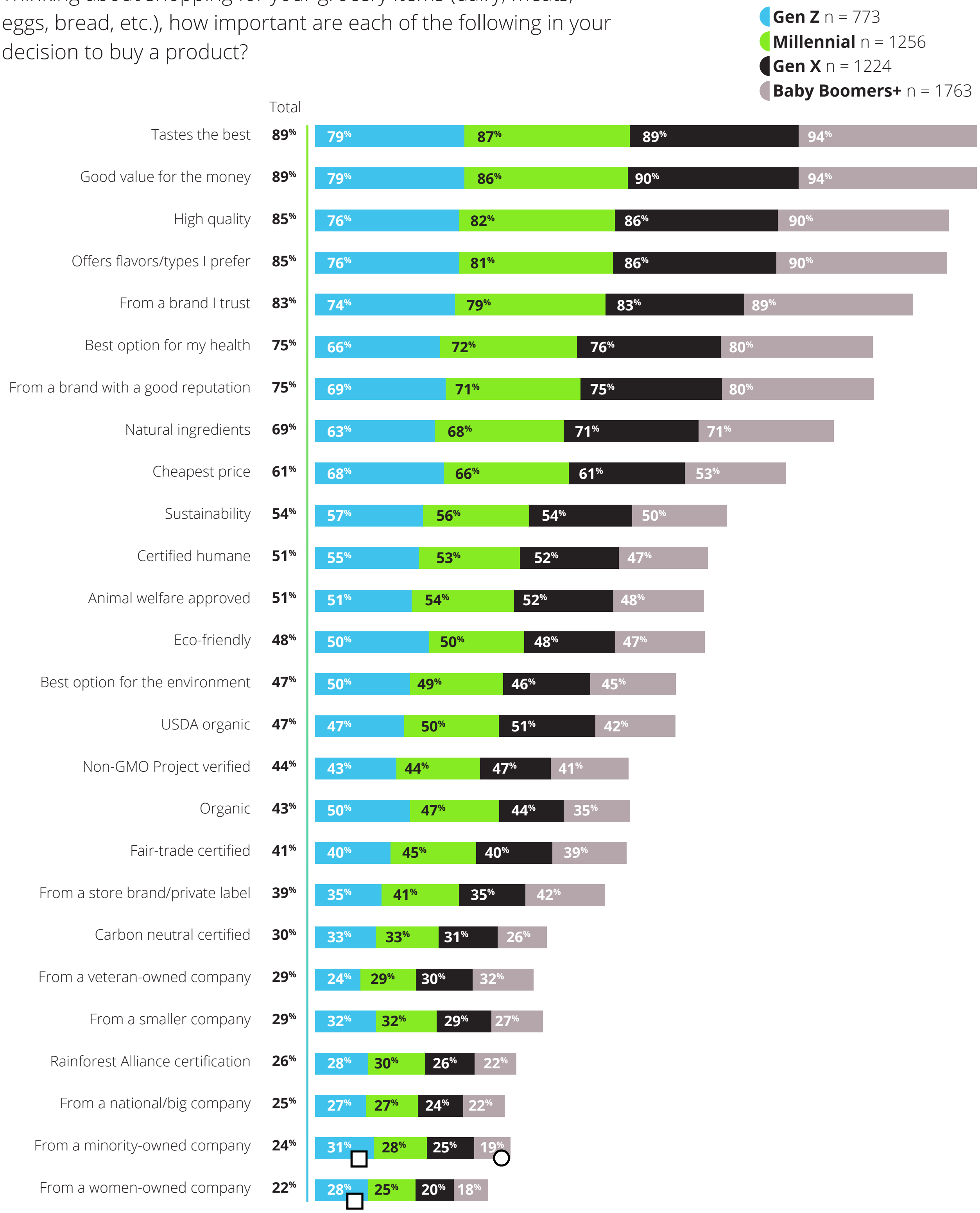
Purchase Drivers % Very/Somewhat important (generation)

Thinking about shopping for your grocery items (dairy, meats, eggs, bread, etc.), how important are each of the following in your decision to buy a product?



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Summary + Implications

What does it all mean?

What drives consumer purchases in the grocery store? Shoppers optimize their purchases first for their own preferences and self interests. They're also concerned with (and in some instances restricted by) price and value—seeking out products that offer a bang for their buck or are priced the cheapest.

How can brands use this data?

Pair sustainability attributes with other drivers: About half of respondents consider sustainability important when grocery shopping, although it ranks lower than taste, value, and quality. Brands should emphasize sustainability alongside these primary purchase drivers to connect with shoppers.

Make the connection to health: Further on in the study (and in this report), consumers were directly asked to choose if they'd purchase a lower-priced, non-sustainable loaf of bread or one that's higher-priced and sustainable. While the majority chose the lower-priced loaf, most of those who did choose the sustainable option cited personal health reasons for doing so. For consumers, health is deeply personal; sustainable brands that offer health benefits can reach consumers by leveraging how they aid in health and wellness.

SECTION 2

“Sustainability” is in the eye of the consumer.

How do consumers understand and define sustainability? What attributes or characteristics signal to consumers that a product is sustainable?

In both qualitative and quantitative phases, consumers were forced to choose the definition (of three) that they felt best described sustainability. Though definitions were optimized between the two research phases, the majority of respondents gravitated toward similar descriptions. *See the appendix of this report for detailed samples of the definitions participants were shown in both research phases.*

Sustainability defined: Minimal environmental impact; broad benefits.

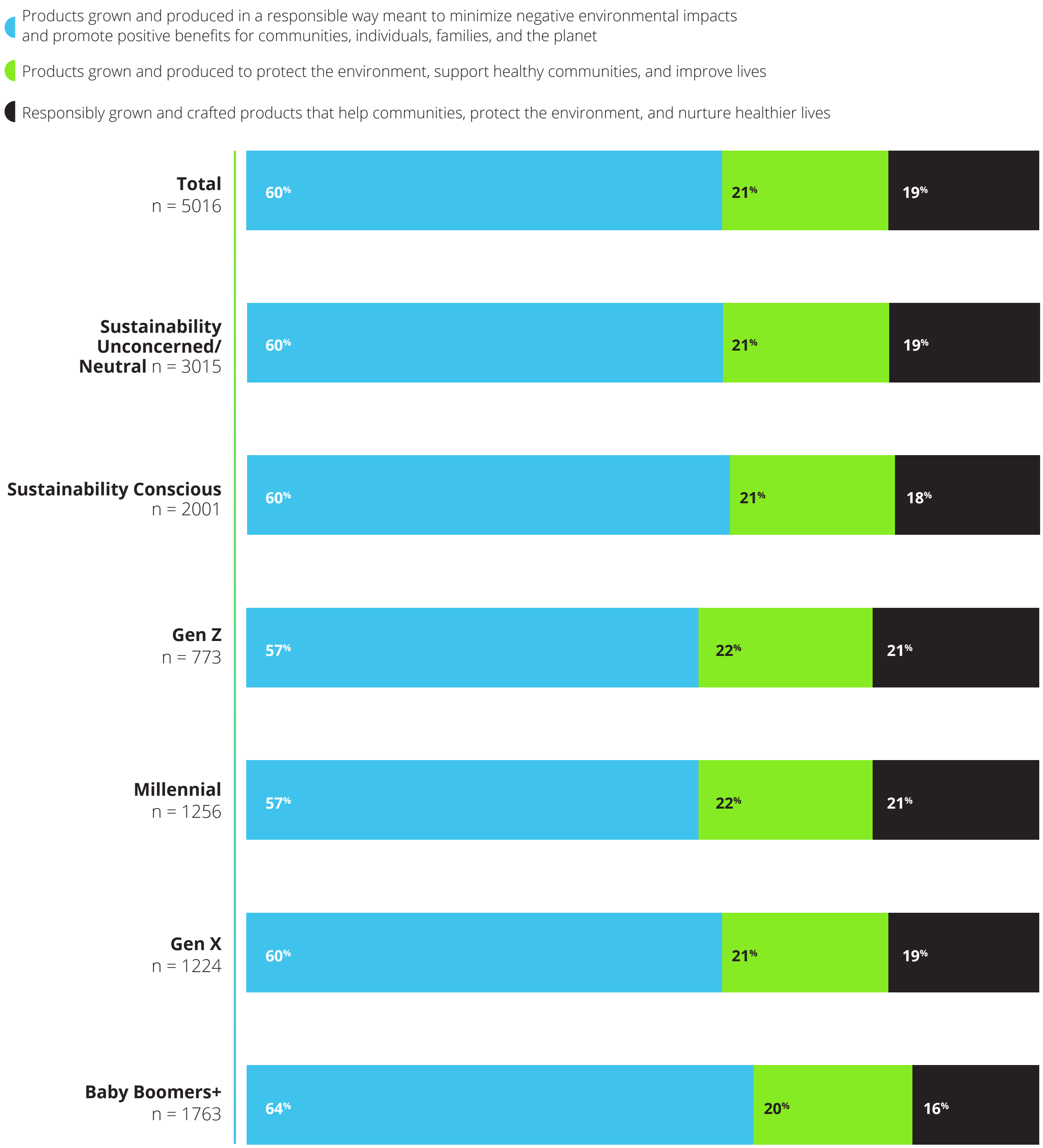
When faced with three definitions of sustainability, shoppers overwhelmingly chose the following definition (60%), which was more comprehensive and all-encompassing than the two others presented (21% and 19%, respectively).

> Products grown and produced in a responsible way meant to minimize negative environmental impacts and promote positive benefits for communities, individuals, families, and the planet.

Preferred Sustainability Definition

(generation/sustainability) ranked 1st

Please read each of the following definitions of sustainability. Then place a 1 by the definition that you feel best defines sustainability, a 2 by the definition that next best defines sustainability, and a 3 by the definition that next best defines sustainability.



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Overall knowledge of sustainability has room to grow.

After reading definitions, just over half (52%) of all shoppers said they felt somewhat or much more knowledgeable about sustainability, even more among younger generations (Gen Z, Millennials), non-White respondents (Hispanic, Black, other), and the Values segment. This signifies that there's room for knowledge growth among consumers when it comes to the topic of sustainability.

Further, the majority (71%) said they wouldn't change anything or don't need further clarifications to this definition, though a few mentioned wanting specific examples, especially around the positive benefits.

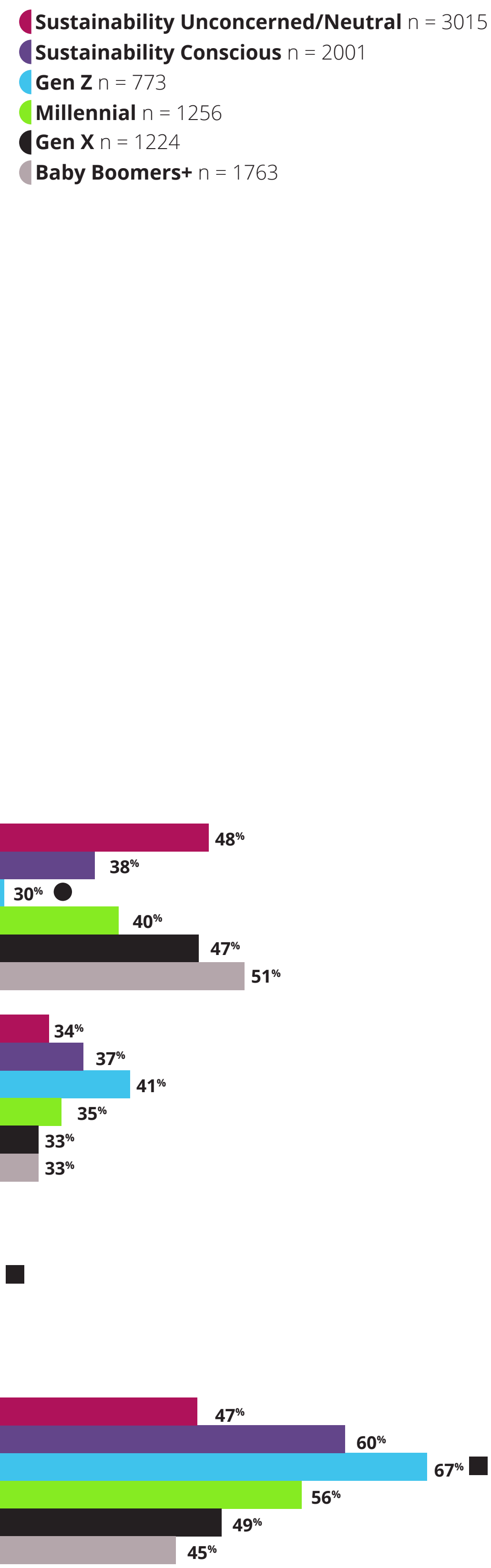
> **"'Positive benefits' is too vague. What are those benefits? I thought sustainability meant that the benefit was the product and the circumstances required to produce it were sustained and not harmed."**
>
> - Gen X woman, Sustainability Neutral, preferred definition 1

> **"Give some more detailed examples of products that fit under that criteria. It could help quite a bit."**
>
> - Gen Z man, Sustainability Conscious, preferred definition 3

Knowledge Level Based on Sustainability Definition

(generation/sustainability)

After reading this definition, how knowledgeable do you feel about sustainability?



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“Best option for the environment” and “eco-friendly” most indicate sustainability.

When ranking how much or little specific attributes make them think of sustainability, “best option for the environment” and “eco-friendly” ranked highest among all groups. These were followed by terms like “natural ingredients,” “carbon neutral certified,” and “organic.” Gen Z respondents are more likely to associate sustainability with a reputable (57% vs. 45% general population) and trustworthy (51% vs. 42% general population) brand.

Specific certifications also lent toward an association with sustainability:

- Carbon neutral: **70%**
- Rainforest Alliance certification: **66%**
- USDA organic: **66%**
- Certified humane: **65%**
- Animal welfare approved: **64%**
- Non-GMO Project verified: **59%**
- Fair-trade certified: **57%**

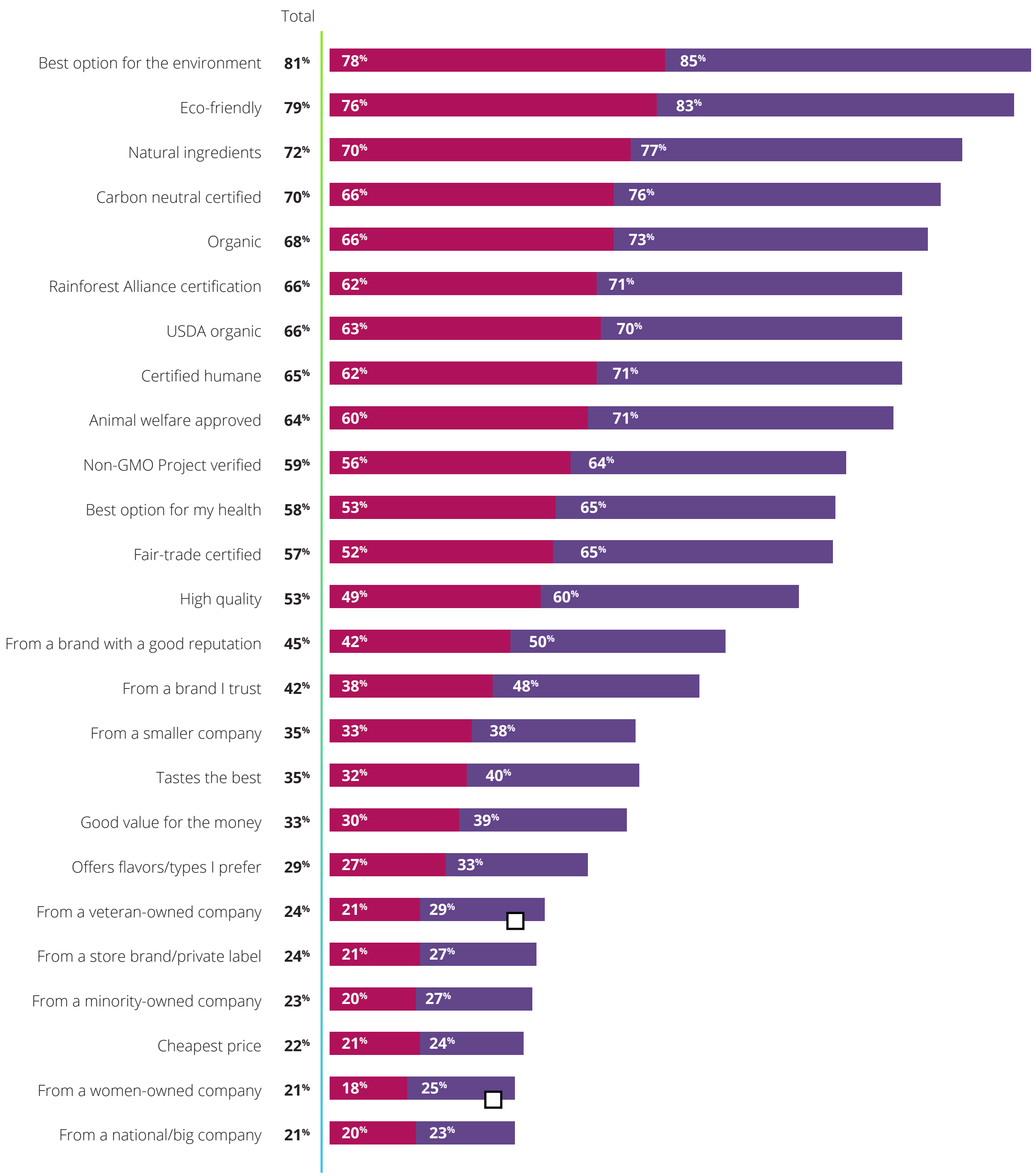
Brands, take note:

The attributes shoppers associate with sustainability are *not* the same as what drives them to make a purchase. When comparing attributes against purchase drivers (in Section 1 of this report), top purchase drivers like taste, value, quality, and price actually rank lower when associated with sustainability.

Attributes Associated with Sustainability (sustainability segments)

Please review the list of words/phrases below and rate them based on how similar or connected they are to 'sustainability.'

Sustainability Unconcerned/Neutral n = 3015
Sustainability Conscious n = 2001



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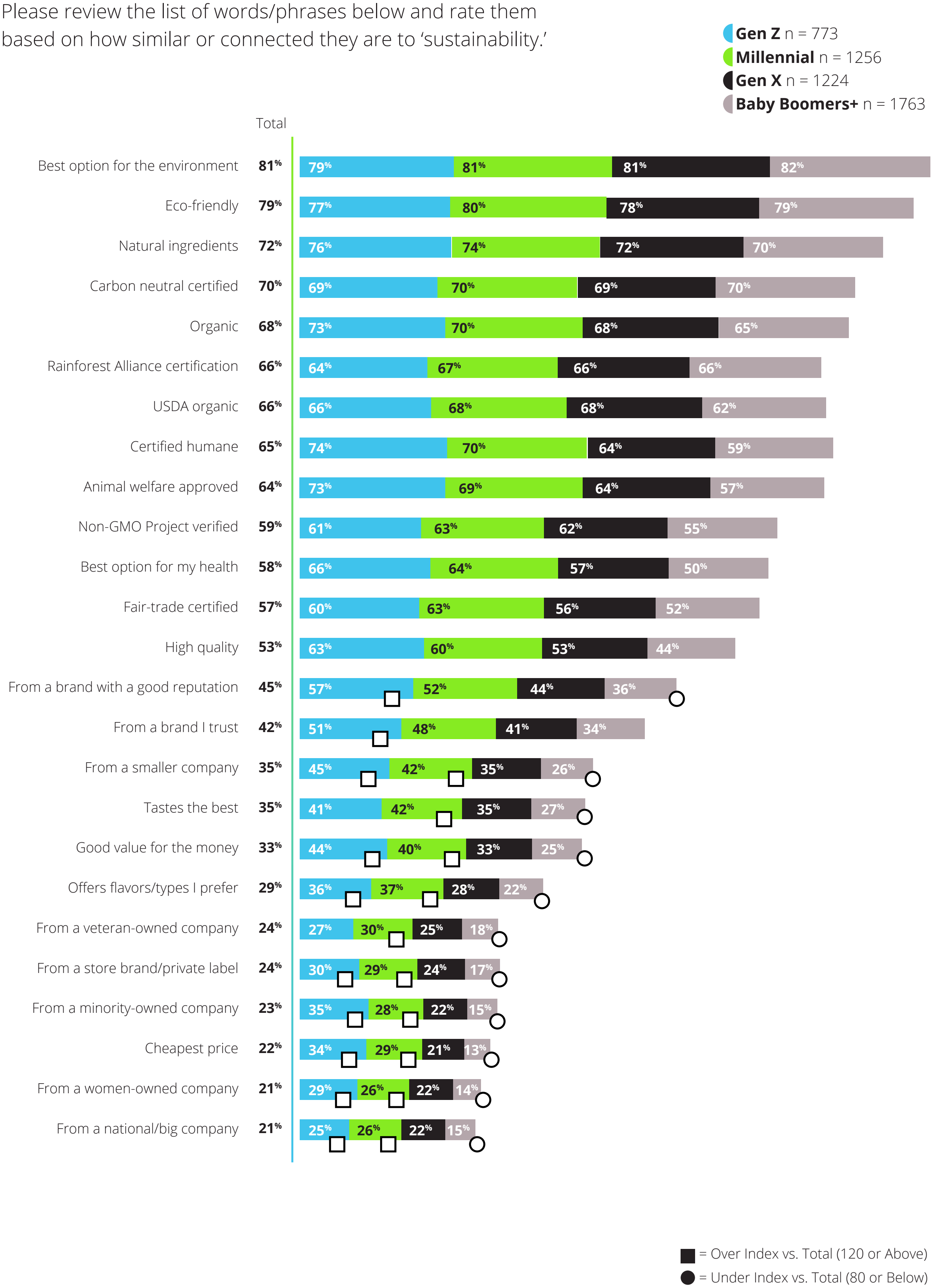
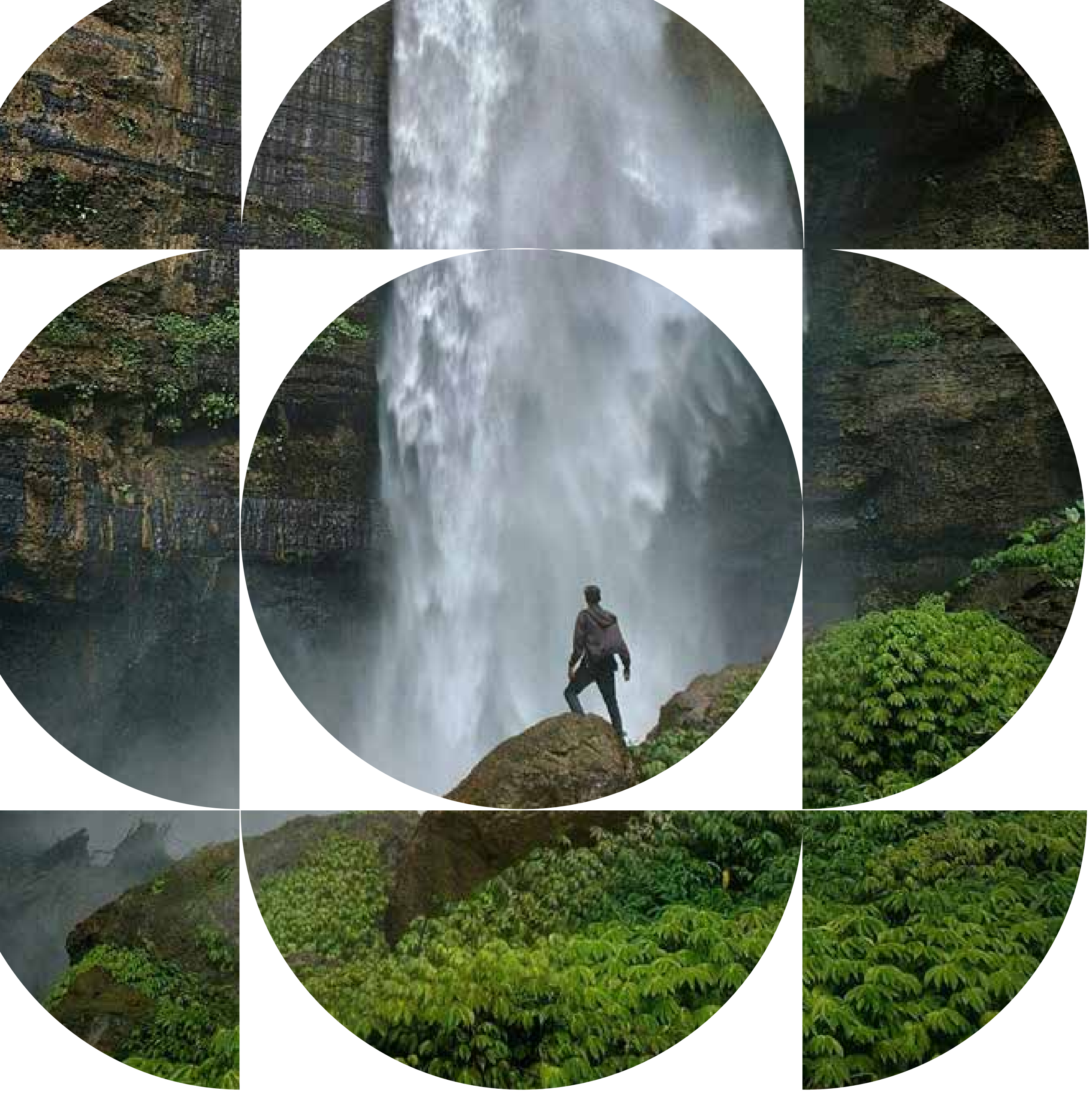
Attributes Associated with Sustainability
(generation)

Please review the list of words/phrases below and rate them based on how similar or connected they are to 'sustainability.'





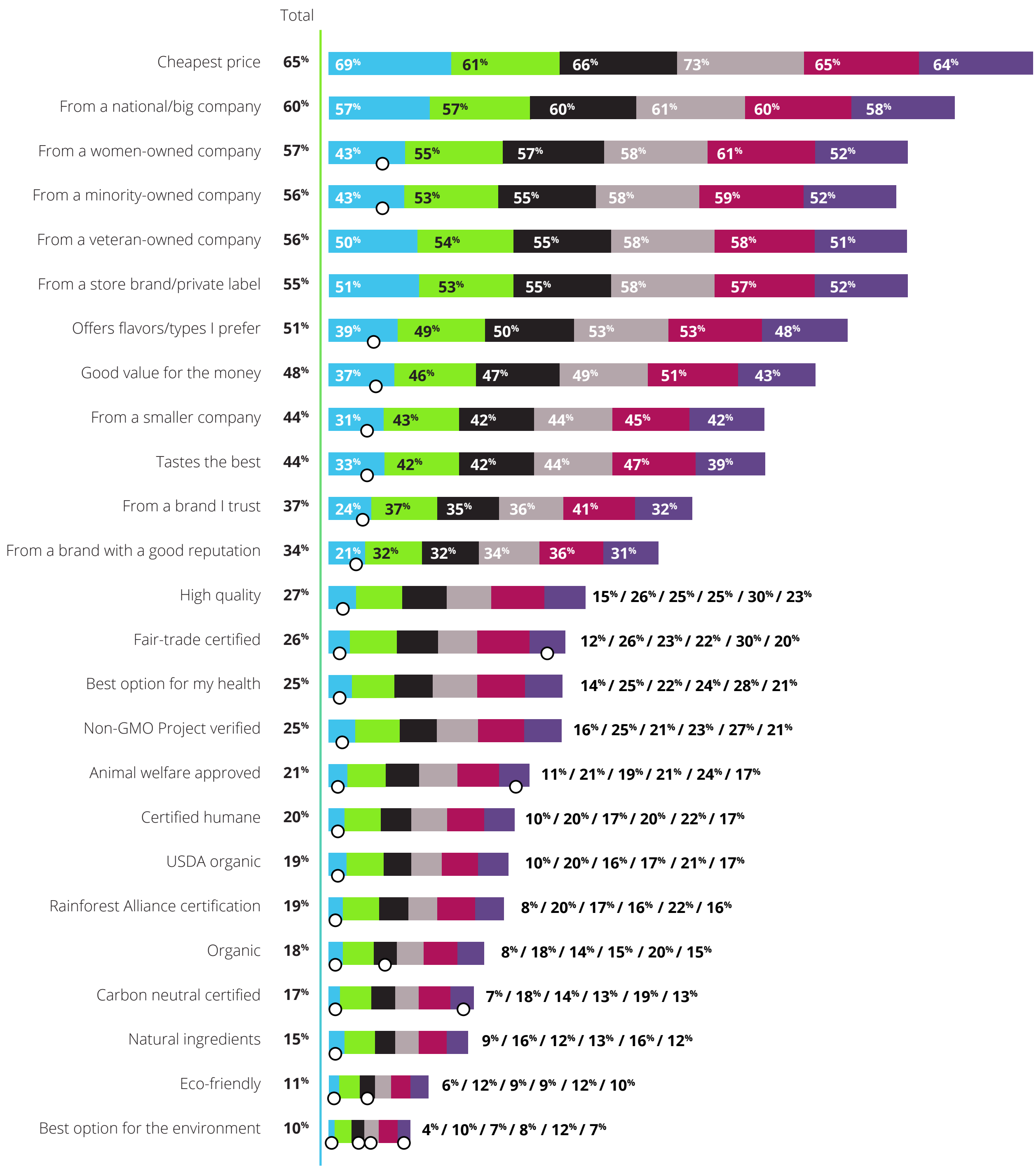
Cheapest price and company attributes are *not* associated with sustainability.

Importantly, shoppers do not associate sustainability with products that are the cheapest price (65%) or from specific types of companies (national/big, women-owned, minority-owned, veteran-owned, store brand/private label).

Attributes not Associated with Sustainability (sustainability/other)

Please review the list of words/phrases below and rate them based on how similar or connected they are to 'sustainability.'

Values Segment n = 488
Convenience Segment n = 3470
Health Segment n = 3429
Quality Segment n = 1412
Sustainability Unconcerned/Neutral n = 3015
Sustainability Conscious n = 2001



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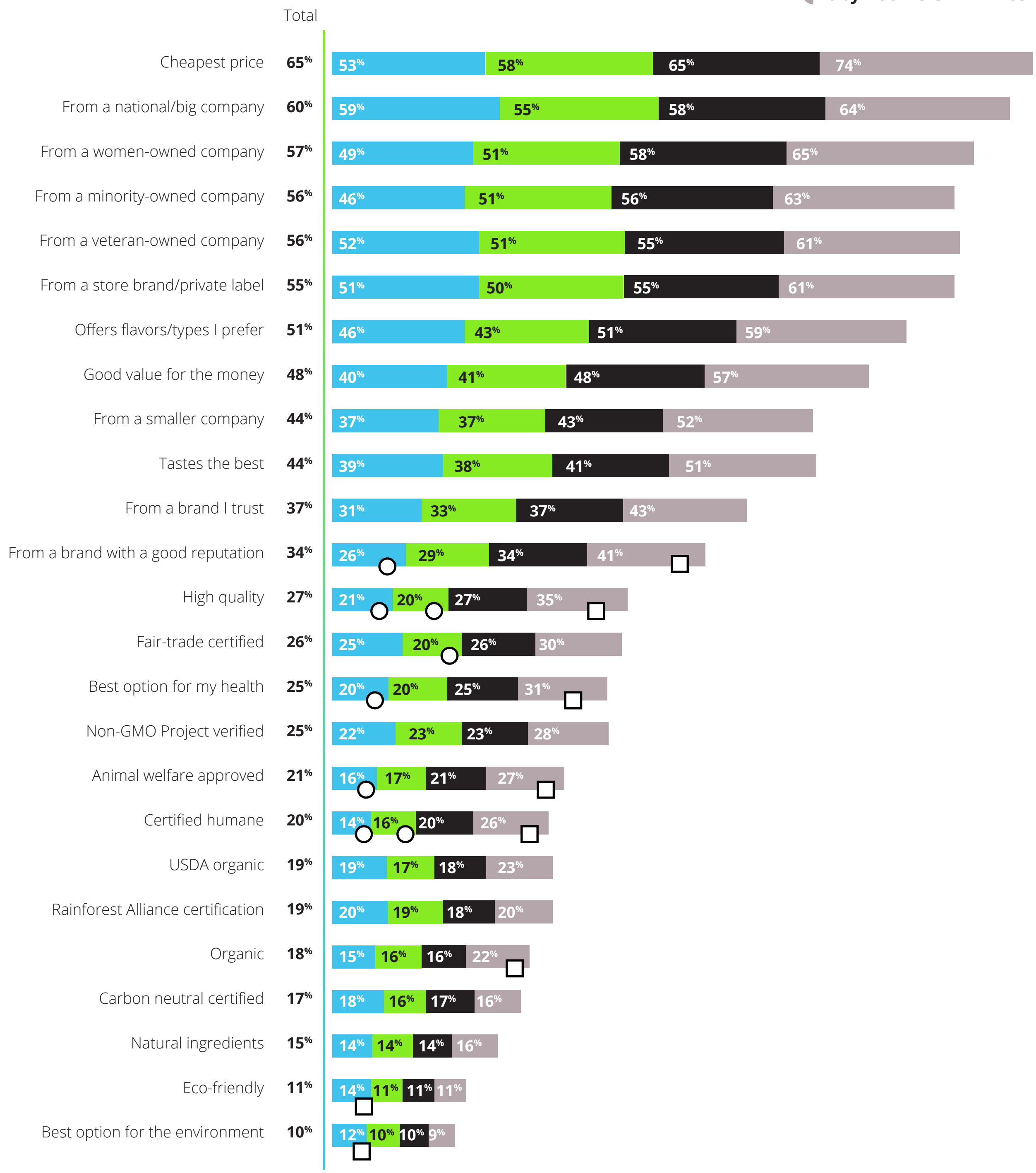
Attributes not Associated with Sustainability (generation)

Please review the list of words/phrases below and rate them based on how similar or connected they are to 'sustainability.'

Gen Z n = 773
Millennial n = 1256
Gen X n = 1224
Baby Boomers+ n = 1763



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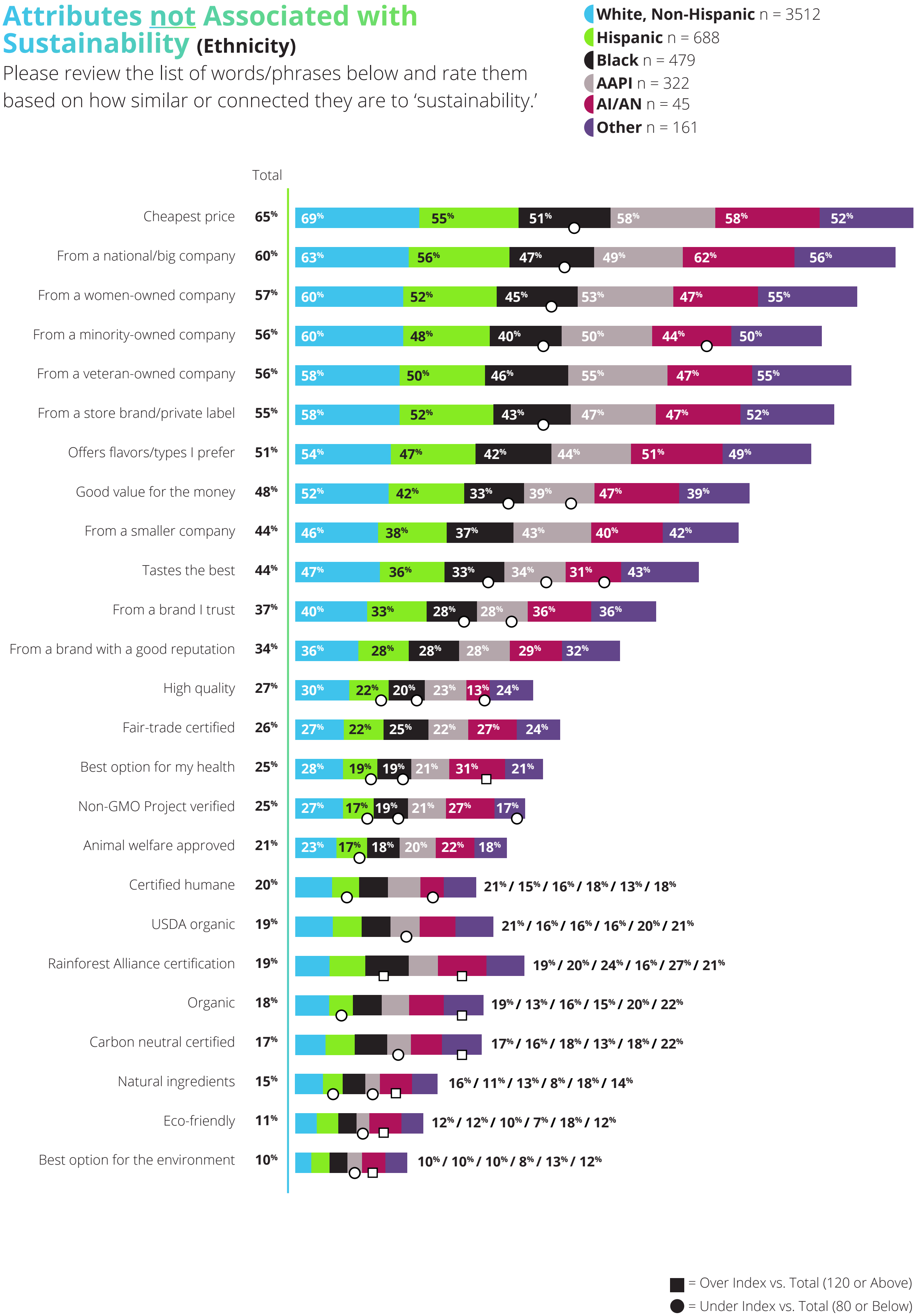
Attributes not Associated with Sustainability (Ethnicity)

Please review the list of words/phrases below and rate them based on how similar or connected they are to 'sustainability.'



To shoppers, smaller companies = sustainability more than national/big ones.

More consumers (35%) associate smaller companies with sustainability than national or big ones (21%), even more so for Gen Z (45%), Millennial (42%), Black (42%), and Values Segment (50%) respondents. Why? Due to their smaller size, shoppers assume these companies are more connected to the local community and less focused on pure profits. Qualitative participants also noted smaller or local brands are generally seen as more trustworthy when it comes to sustainability, believing these companies to be more likely to genuinely prioritize environmental concerns over profits.

Those who *don't* associate smaller companies with sustainability (65% in the quantitative) believe they don't have the resources or infrastructure to be sustainable given their size.

> **"As a smaller company, it's easier for them to ensure they are applying sustainable practices if they choose to. Not all small companies will do that, but there aren't a lot of people making decisions so it is easier."**
>
> - Millennial woman, Sustainability Neutral, associates smaller companies with sustainability (quantitative)

> **"Just being a smaller company doesn't automatically mean they're sustainable. While there are some small companies that do try to be more eco-conscious, not all of them have the resources, knowledge, or infrastructure to actually follow through on sustainable practices."**
>
> - Gen Z woman, Sustainability Conscious, does *not* associate smaller companies with sustainability (quantitative)

> **"I am more likely to believe that a small or local brand is sustainable rather than a big national corporation. To me, smaller companies may take the additional efforts to make more sustainable products and are concerned about the environment rather than the bottom line."**
>
> – Woman, Sustainability Unconcerned (qualitative)

One in five shoppers (21%) associate national/big companies with sustainability because of a belief that they have the resources to produce items sustainably and have the ethical responsibility given their size. Most respondents (79%), however, do *not* associate national/big companies with sustainability due to the pressures to keep prices low and produce a profit. This was echoed in the qualitative phase, where consumers viewed larger companies with more skepticism due to their significant environmental impact and perceived focus on profit over genuine sustainability efforts.

> **"Large companies often have more resources to invest in sustainability (like certifications, renewable energy, and ethical supply chains), and their efforts are more visible due to public reporting and branding."**
>
> - Gen Z man, Sustainability Conscious, associates national/big companies with sustainability (quantitative)

> **"Because it seems to me that they would be more likely to cut corners to try and save money and wouldn't be as involved in worrying as much about the environment as say a small business would be."**
>
> - Millennial woman, Sustainability Neutral, does *not* associate national/big companies with sustainability (quantitative)

> **"On one hand, seeing sustainable practices done by brands or seeing ecologically positive behaviors is very positive to me and I enjoy seeing companies do good for the Earth. On the other hand, I feel as if there will always be an inevitable truth that big companies will do what they can to earn their money and they will likely stay that way."**
>
> – Man, Sustainability Neutral (qualitative)

Summary + Implications

What does it all mean?

When defining sustainability, consumers most want to hear how the product (or process) minimizes negative effects and broadly benefits people, communities, and the planet—and they want specifics. Providing consumers with a definition helped boost knowledge for the majority, signifying that some degree of education is needed. To signal an item is sustainable, focus on a product's specific attributes or characteristics rather than focusing (at least solely) on the company more broadly.

How can brands use this data?

Speak plainly: If consumers don't understand what sustainable really means, they won't get why they should consider purchasing products that tout the claim. Brands should consider educating shoppers on what sustainability is and its implications before providing proof.

Use certifications: Third-party certifications are seen as reliable indicators of authenticity. Leveraging certifications like USDA Organic, Fair Trade, and Carbon Neutral can help enhance sustainability claims.

Lead with the product over the company: Surveyed shoppers cared less about the company makeup than they do the product itself. Don't assume your company's story is what consumers are drawn to.

SECTION 3

The say-do gap is...sustaining.

So are consumers actually following through on intent and buying sustainable items? How do shoppers' sustainable purchases compare to the conventional items they buy? Are sustainable purchases increasing over time?

Most shoppers buy a mix of sustainable and non-sustainable food.

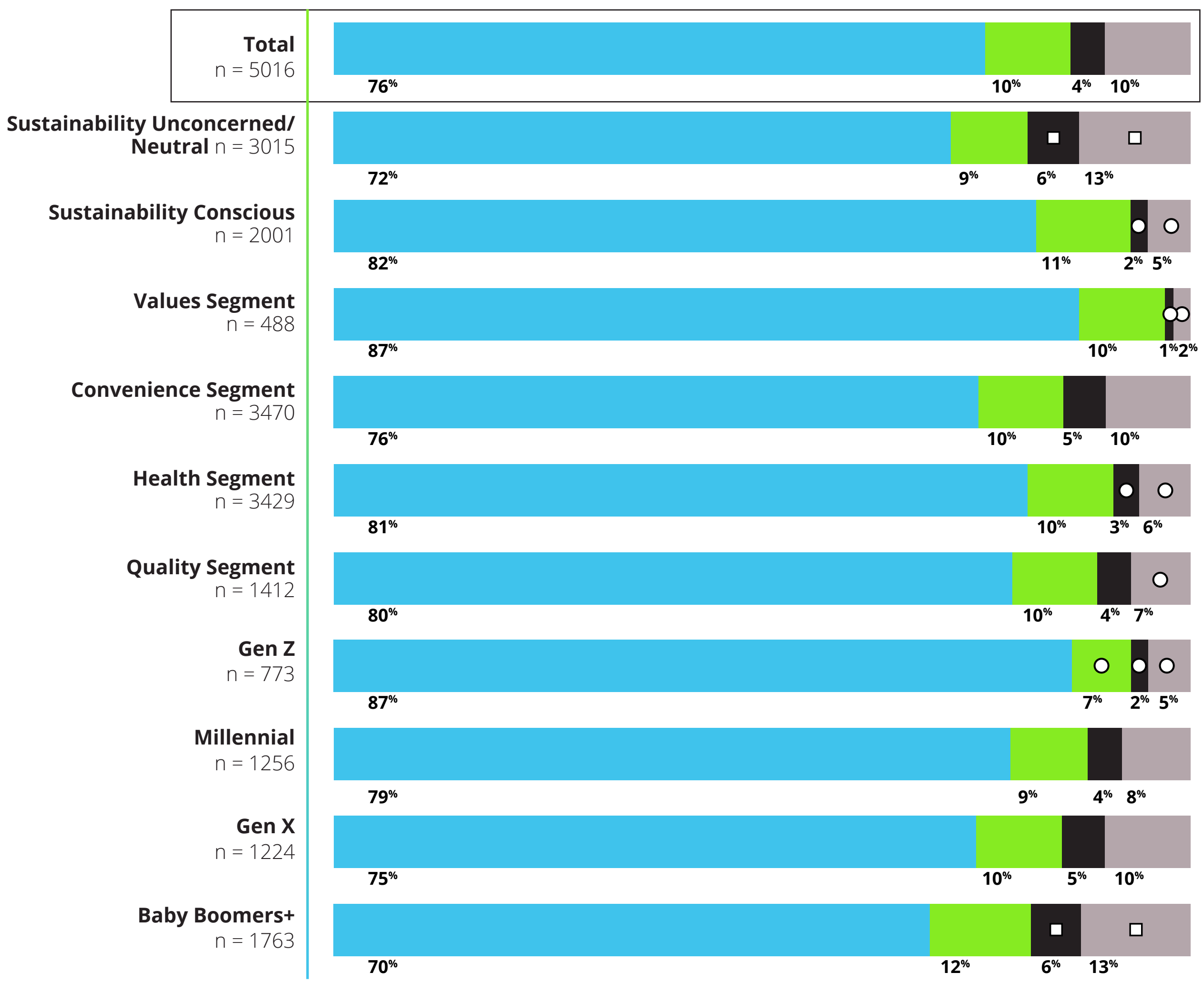
The majority (76%) of surveyed consumers buy at least some sustainable items while grocery shopping, and 10% state that they buy exclusively sustainable items. Another 10% are unsure. This quantitative finding is aligned with transactional shopper data, which showed most consumers choose to cross-shop (i.e., buy both conventional and sustainable products) versus buying exclusively one way or the other.

Of the 4% who exclusively buy non-sustainable items, most (90%) have done so as long as sustainable products have been around. A few (n=22) who say they used to buy sustainable goods but don't anymore cite price for the change.

Buy Sustainable Items (Any Grocery Item Asked About)

Thinking about shopping for the following food & beverage items, what type do you typically buy?

Buy Mix of Sustainable and Non-Sustainable Goods
Exclusively Sustainable Goods
Exclusively Non-Sustainable Goods
Unsure / Don't know



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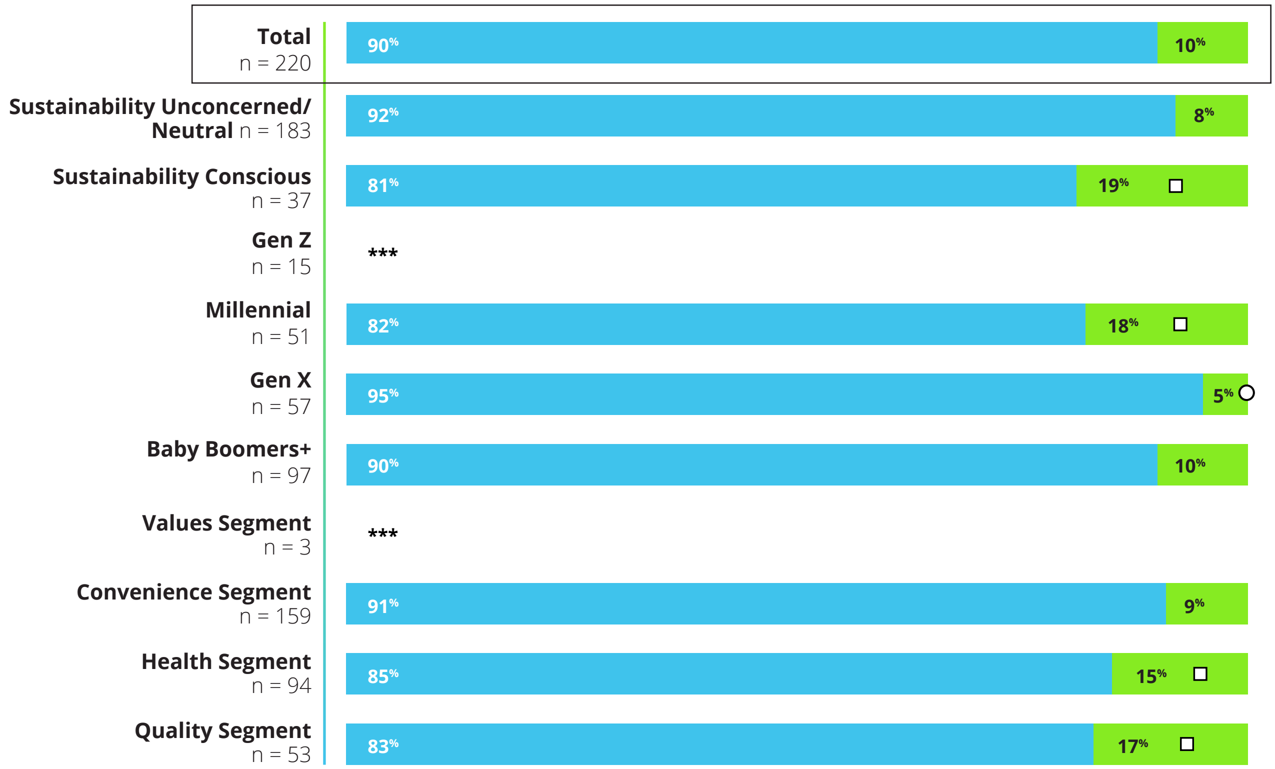
Non-Sustainable Purchasing Behavior

Yes, I've always bought just non-sustainable items
No, I used to buy sustainable items

Are the types of items you're purchasing now typical of what you've always bought?
(Those who purchase non-sustainable items exclusively)



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**Caution: Extremely small sample size; too small to report

Transactional Data: Consumer Cross-shop on Conventional vs. Sustainable Categories

	% of shoppers spending on each category this year			YoY Difference (this year to last year)		
Category	**Conventional Only**	**Sustainable Only**	**Both** (i.e., conventional and sustainable)	**Conventional Only**	**Sustainable Only**	**Both** (i.e., conventional and sustainable)
Canned / Shelf Stable	44.7%	0.3%	55.0%	0.6%	0.0%	-0.6%
Dairy	26.9%	0.3%	72.8%	-0.4%	0.0%	0.4%
Drinks	31.9%	0.3%	67.8%	0.9%	0.0%	-0.9%
Eggs	52.3%	7.7%	40.0%	-4.5%	-0.7%	5.1%
Frozen Grocery	38.5%	0.3%	61.1%	0.5%	0.0%	-0.5%
General Merch	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Grocery Misc.	16.7%	0.1%	83.2%	-0.5%	0.0%	0.5%
Health	54.0%	13.5%	32.5%	1.4%	-1.1%	-0.3%
Produce	90.6%	0.0%	9.4%	-0.2%	0.0%	0.2%
Snacks	28.0%	0.5%	71.5%	-0.6%	0.1%	0.6%

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Produce and eggs are the categories consumers most often purchase for sustainability.

The most-chosen food category consumers buy sustainably are fresh fruits/vegetables (46%) and eggs (44%). Both items were higher among shoppers who are Sustainability Conscious (55%, 53%, respectively) and in the Values Segment (63%, 60%, respectively).

According to the transactional data reviewed for this study, most product categories (including eggs) saw **decreasing price gaps between sustainable and conventional products from March 15, 2024 to March 15 2025**—though price gaps for frozen grocery, produce, and snacks increased over this same period. This seems to indicate that consumers prefer buying sustainably for specific product categories (produce, eggs) regardless of price.

Transactional Data: Conventional vs Sustainable Products' Prices Over Time by Category

	Conventional Products Average Unit Price		Sustainable Products Average Unit Price		Price Gap		
Category	**This Year**	**Last Year**	**This Year**	**Last Year**	**This Year**	**Last Year**	**Qualitative**
Canned / Shelf Stable	1.78	1.75	2.50	2.55	-0.72	-0.80	Decreasing
Dairy	3.05	3.01	3.78	3.85	-0.73	-0.84	Decreasing
Drinks	3.98	4.02	3.66	3.58	0.32	0.44	Decreasing
Eggs	4.22	2.83	5.86	5.24	-1.65	-2.41	Decreasing
Frozen Grocery	4.12	4.14	5.54	5.34	-1.42	-1.20	Increasing
General Merch	7.23	7.43	7.62	6.50	-0.39	0.93	Decreasing
Grocery Misc.	3.52	3.45	5.05	5.02	-1.54	-1.56	Decreasing
Health	7.29	7.57	4.34	4.34	2.95	3.24	Decreasing
Produce	2.84	2.69	3.63	3.43	-0.79	-0.75	Increasing
Snacks	3.75	3.81	4.25	4.20	-0.50	-0.39	Increasing
Overall	**3.42**	**3.36**	**4.28**	**4.22**	**-0.86**	**-0.85**	**Increasing**

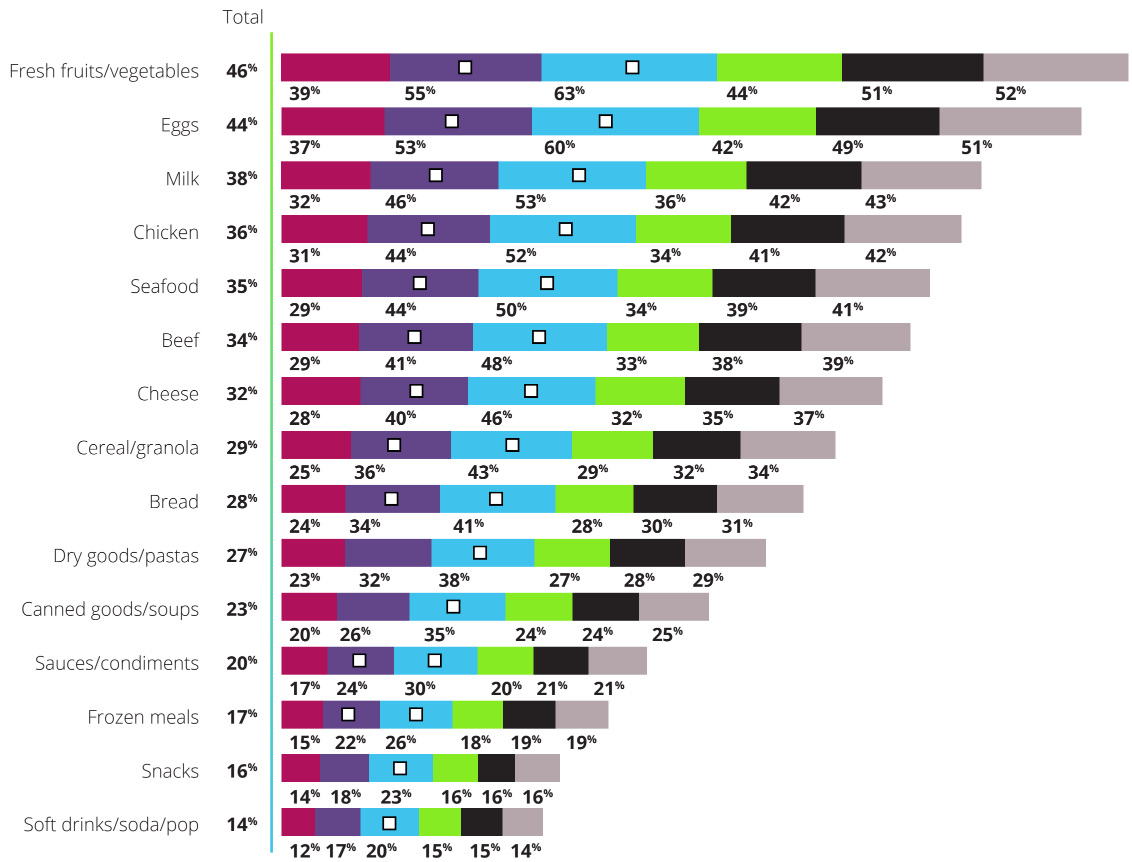
■ = Over Index vs. Total (120 or Above)
● = Under Index vs. Total (80 or Below)

Buy Sustainable Items (% Mostly Sustainable)

(sustainability/other)

Thinking about shopping for the following food & beverage items, what type do you typically buy?

Sustainability Unconcerned/Neutral n = 3015
Sustainability Conscious n = 2001
Values Segment n = 488
Convenience Segment n = 3470
Health Segment n = 3429
Quality Segment n = 1412



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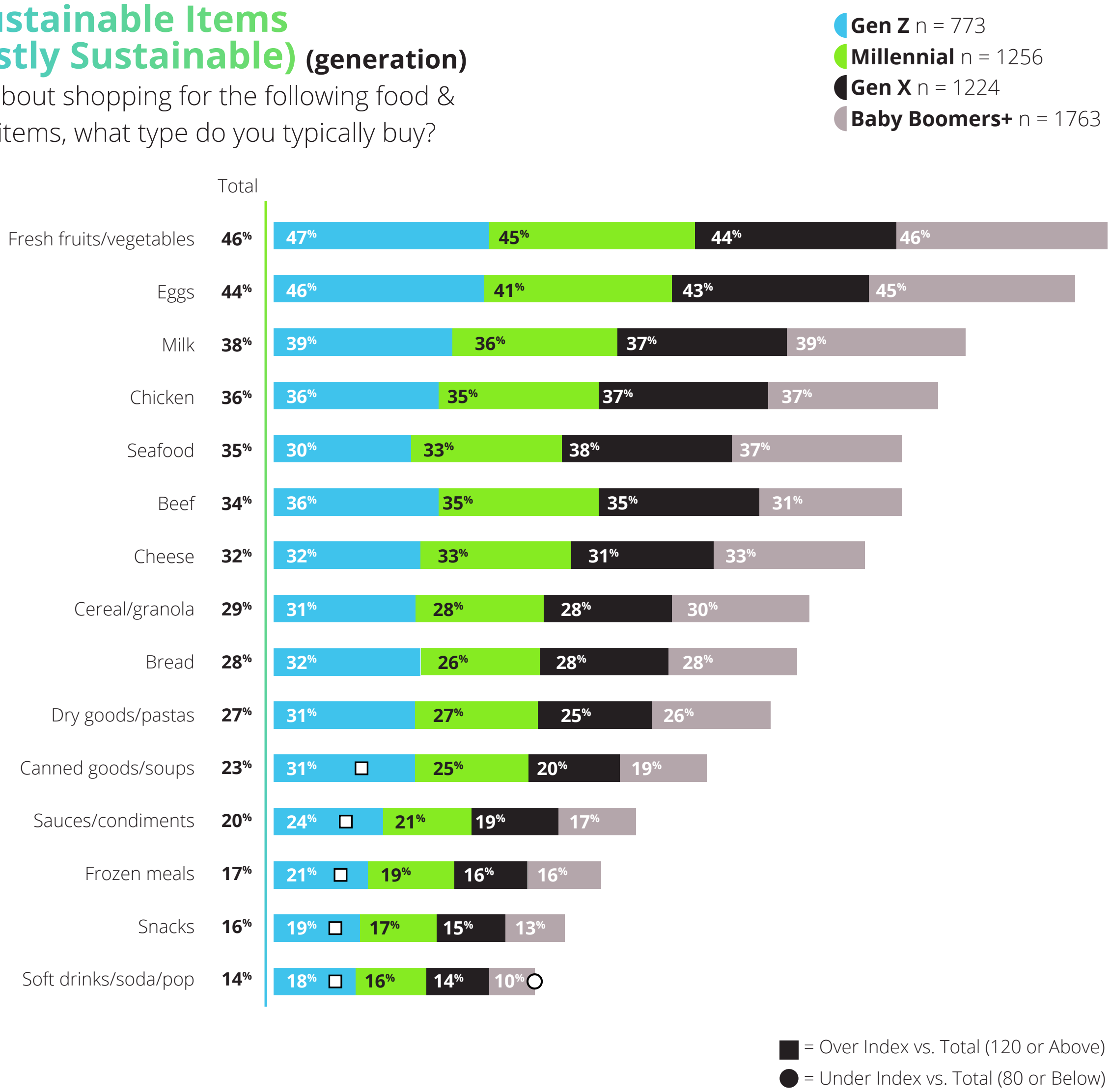
Buy Sustainable Items (% Mostly Sustainable) (generation)

Thinking about shopping for the following food & beverage items, what type do you typically buy?



Sustainable food purchases are increasing … slightly.

A quarter to a third of respondents say they're buying sustainable items more than before, even more for those who are Gen Z, non-White, or in the Values Segment. Only a few shoppers are buying sustainable options less often than before. This is aligned with transactional data, which showed that Gen Z and Millennial shoppers are increasing their frequency of sustainable purchases faster than older consumers (4% annual increase for Gen Z and Millennials; -1% for Gen X and Boomers).

Of those who report buying more sustainable items lately, shoppers are most motivated by health reasons, the environment, or value. Those who've bought less sustainable items are primarily restrained by price.

"My family and I are buying more organic when it comes to food as it is better for us."
- Gen Z woman, Sustainability Neutral, purchasing more sustainable items

"Trying to do good for the environment."
- Boomer man, Sustainability Neutral, purchasing more sustainable items

"I am eating healthier, and [sustainable] produce is the best option and also most affordable."
- Gen X woman, Sustainability Neutral, purchasing more sustainable items

"Everything's more expensive now."
- Gen X man, Sustainability Conscious, purchasing less sustainable items

"Overall it has to do with price. Sustainability usually entails a higher price, which at my current stage of life, I can't afford."
- Gen Z man, Sustainability Conscious, purchasing less sustainable items

Buy Sustainable Items More Often Than Before (% Much/Slightly More)

Compared to what you typically buy, are you buying sustainable items more, less, or about the same right now?

(SUSTAINABILITY/OTHER)

	Total	Sustainability Unconcerned/Neutral n = 3015	Sustainability Conscious n = 2001	Values Segment n = 488	Convenience Segment n = 3470	Health Segment n = 3429	Quality Segment n = 1412
Fresh fruits/vegetables	38%	34%	44%	53% ■	37%	43%	45%
Chicken	33%	29%	38%	50% ■	31%	36%	38%
Eggs	32%	29%	37%	45% ■	31%	36%	36%
Milk	29%	25%	33%	44% ■	28%	33%	33%
Beef	28%	25%	33%	43% ■	27%	32%	34%
Cheese	28%	25%	33%	41% ■	27%	32%	32%
Seafood	27%	22%	33% ■	44% ■	25%	30%	34% ■
Cereal/granola	25%	21%	31% ■	37% ■	26%	28%	29%
Dry goods/pastas	25%	21%	29%	37% ■	25%	27%	27%
Bread	24%	21%	28%	37% ■	24%	27%	28%
Soft drinks/soda/pop	23%	22%	26%	36% ■	24%	25%	25%
Frozen meals	23%	20%	27%	35% ■	24%	24%	25%
Snacks	23%	19%	28% ■	33% ■	24%	25%	27%
Canned goods/soups	22%	19%	26%	33% ■	23%	23%	25%
Sauces/condiments	21%	16% ●	26% ■	33% ■	21%	23%	24%

(GENERATION)

	Total	Gen Z n = 773	Millennial n = 1256	Gen X n = 1224	Baby Boomers+ n = 1763
Fresh fruits/vegetables	38%	46%	37%	38%	36%
Chicken	33%	41% ■	34%	33%	28%
Eggs	32%	39% ■	35%	33%	26% ●
Milk	29%	40% ■	33%	29%	21% ●
Beef	28%	35% ■	32%	29%	21% ●
Cheese	28%	35% ■	32%	29%	21% ●
Seafood	27%	26%	29%	28%	25%
Cereal/granola	25%	29%	31% ■	26%	19% ●
Dry goods/pastas	25%	36% ■	28%	22%	17% ●
Bread	24%	32% ■	28%	26%	17% ●
Soft drinks/soda/pop	23%	30% ■	29% ■	22%	14% ●
Frozen meals	23%	31% ■	29% ■	20%	16% ●
Snacks	23%	35% ■	26%	21%	16% ●
Canned goods/soups	22%	27% ■	26% ■	21%	16% ●
Sauces/condiments	21%	29% ■	25% ■	19%	13% ●

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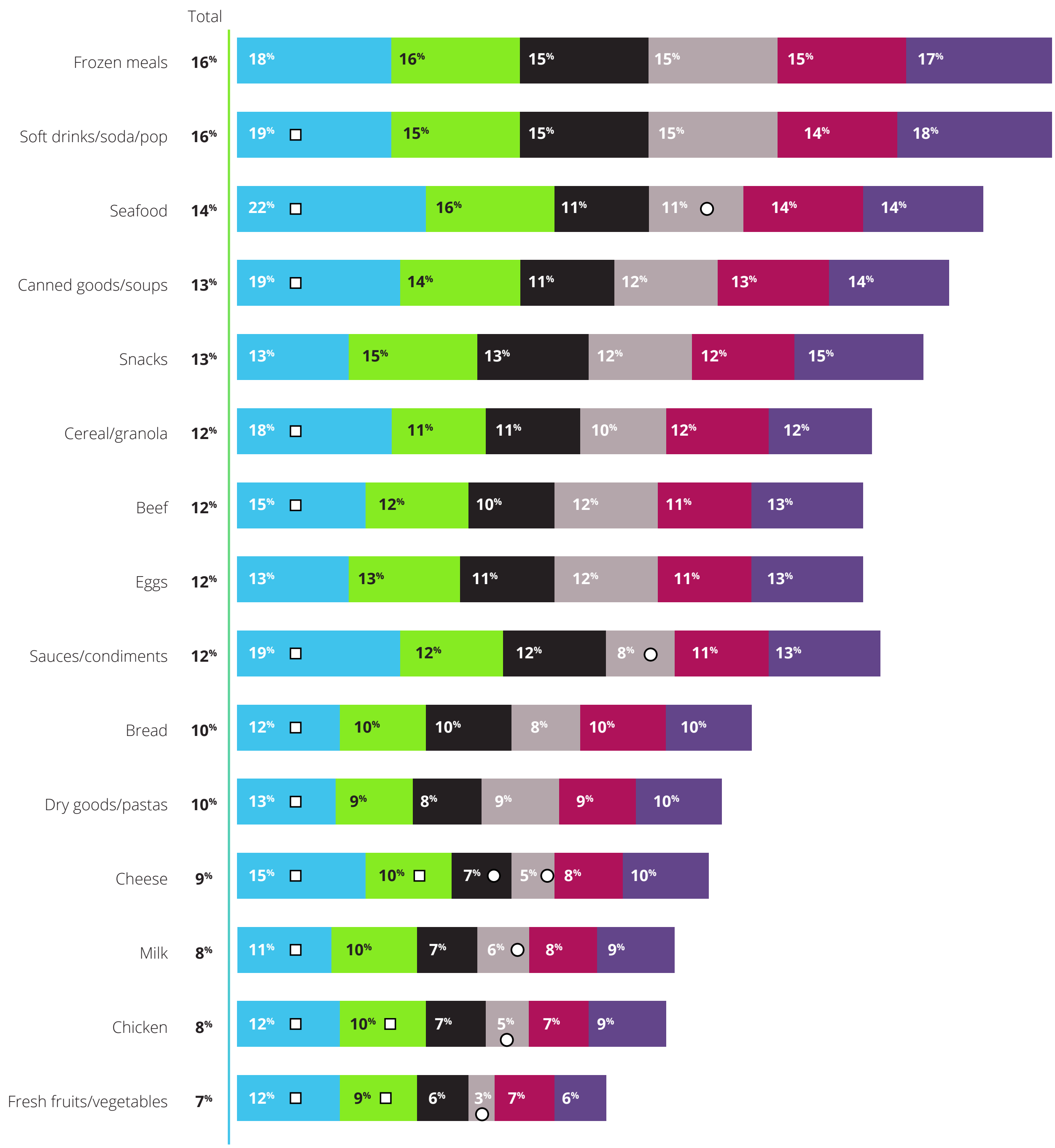
Buy Sustainable Items Less Often Than Before (% Much/Slightly Less)

(generation/sustainability)

Compared to what you typically buy, are you buying sustainable items more, less, or about the same right now?

Gen Z n = 773
Millennial n = 1256
Gen X n = 1224
Baby Boomers+ n = 1763
Sustainability Unconcerned/Neutral n = 3015
Sustainability Conscious n = 2001



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Transactional Data: Year-Over-Year Change in Unit Sales by Age Group

Product Type	Category	19-24	25-34	35-44	45-54	55-64	65-74	75+
Sustainable	Canned / Shelf Stable	12%	14%	7%	3%	2%	0%	-2%
	Dairy	11%	12%	4%	2%	2%	0%	-2%
	Drinks	9%	6%	3%	-1%	-3%	-4%	-5%
	Eggs	18%	18%	10%	8%	6%	3%	2%
	Frozen Grocery	3%	2%	-1%	-4%	-6%	-5%	-6%
	General Merch	-19%	-60%	-63%	-75%	-63%	-82%	-81%
	Grocery Misc.	12%	13%	7%	3%	1%	1%	-1%
	Health	-3%	-6%	-8%	-12%	-13%	-12%	-13%
	Produce	15%	17%	2%	-1%	3%	0%	-6%
	Snacks	9%	9%	4%	-1%	-2%	-2%	-3%
	Overall	**9%**	**9%**	**4%**	**0%**	**-1%**	**-2%**	**-3%**
Conventional	Canned / Shelf Stable	6%	3%	1%	-1%	-3%	-4%	-7%
	Dairy	7%	6%	0%	-3%	-4%	-4%	-7%
	Drinks	6%	8%	1%	-2%	-4%	-4%	-7%
	Eggs	9%	1%	4%	2%	0%	-1%	-4%
	Frozen Grocery	5%	2%	1%	-1%	-2%	-2%	-5%
	General Merch	6%	2%	1%	-2%	-2%	-2%	-7%
	Grocery Misc.	8%	4%	3%	-1%	-2%	-2%	-5%
	Health	3%	-2%	-4%	-5%	-5%	-5%	-6%
	Produce	19%	6%	8%	6%	2%	0%	-3%
	Snacks	3%	2%	-1%	-4%	-5%	-5%	-8%
	Overall	**7%**	**5%**	**1%**	**-1%**	**-3%**	**-3%**	**-6%**
Comparison	Canned / Shelf Stable	>	>	>	>	>	>	>
	Dairy	>	>	>	>	>	>	>
	Drinks	>	<	>	>	>	>	>
	Eggs	>	>	>	>	>	>	>
	Frozen Grocery	<	<	<	<	<	<	<
	General Merch	<	<	<	<	<	<	<
	Grocery Misc.	>	>	>	>	>	>	>
	Health	<	<	<	<	<	<	<
	Produce	<	>	<	<	>	<	<
	Snacks	>	>	>	>	>	>	>
	Overall	**>**	**>**	**>**	**>**	**>**	**>**	**>**

■ =Value Greater Than Zero

● = Sustainable Value Greater than Conventional Value

Summary + Implications

What does it all mean?

Are consumers buying sustainable food? Well, yes … but only for some food categories, and only slightly more than in previous years. Those who are buying more sustainable food items are mainly doing so for health reasons; those who *aren't* are restrained by price.

How can brands use this data?

Highlight benefits and value: Brands should consider leading with a product's impact on personal health, the environment, and their wallets (value).

SECTION 4

For consumers, it's (still) price, price, price.

How do consumers react when presented with options of varying prices? For this section of the quantitative survey, consumers were faced with a buying situation and forced to make a decision between two items. By moving beyond hypotheticals and actually replicating an in-person shopping experience, this section provided the research team with additional transactional data for further consideration.

While consumers understand the benefits of and feel generally positive toward sustainability, high prices are still a hurdle for many and will drive purchase decisions for most over brand or environmental factors. Offering coupons or promotions to bring prices closer to non-sustainable options may motivate consumers to buy, though with an important caveat: Shoppers do not associate cheaper prices with sustainability, so excessively dropping prices can be viewed with skepticism by some.

When asked to choose between a lower-priced non-sustainable loaf of bread and a higher-priced sustainable option, most chose to go cheaper.

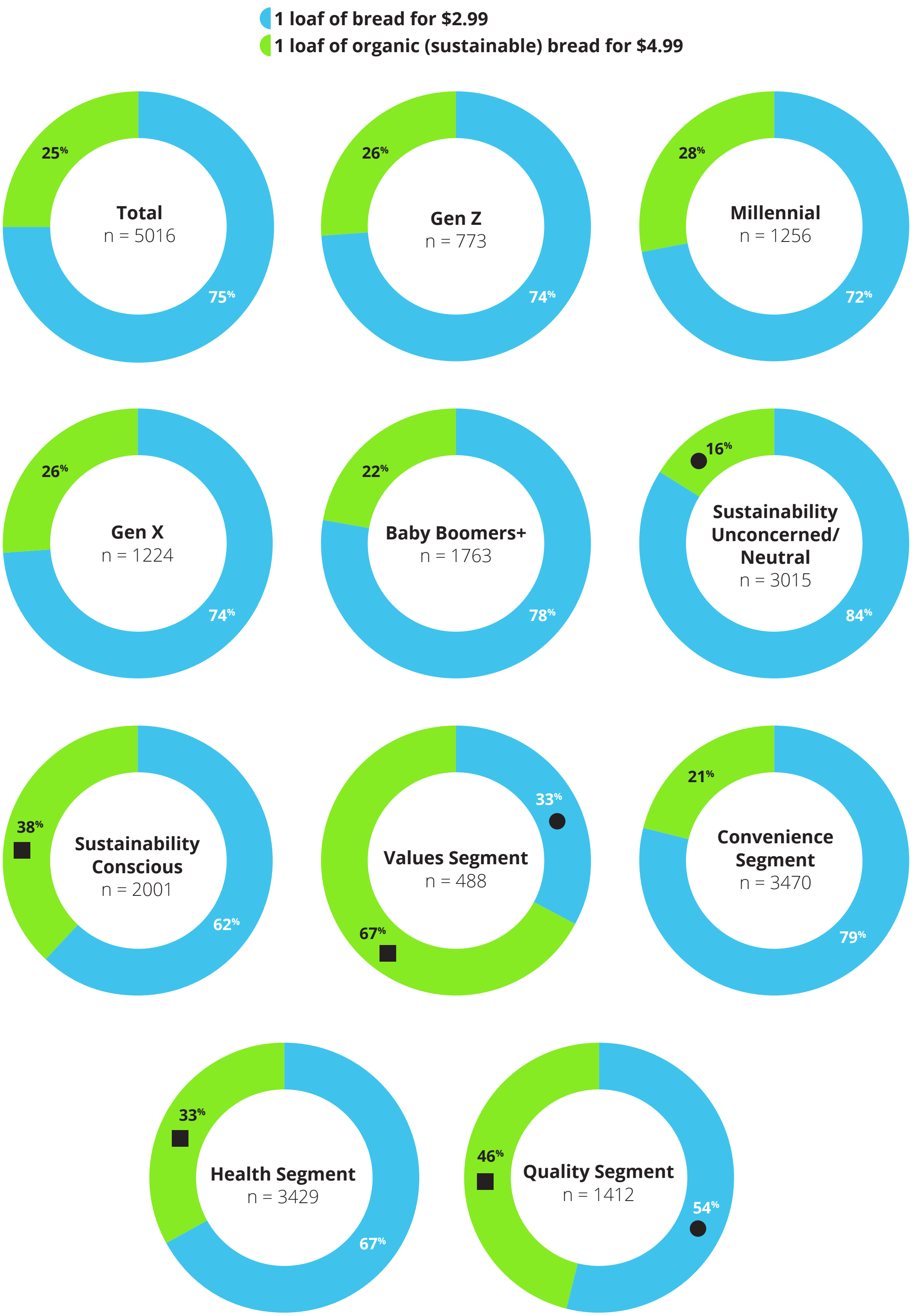
When presented with two bread options—a $2.99 loaf of bread or a $4.99 loaf of organic (sustainable) bread—75% of total shoppers opted for the lower-priced loaf, while only 25% chose sustainable.

This held primarily true across segment groups with a few exceptions:

- Live in the West: **30%** sustainable
- Spending Unconcerned: **37%** sustainable
- Sustainability Conscious: **38%** sustainable
- Quality Segment: **46%** sustainable
- Values Segment: **67%** sustainable

Sustainability Willingness (in General)

Please review the two options below and select which one you would most likely purchase.



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Most consumers who chose the sustainable option did so for health-related reasons; most who didn't were restricted by price.

Of the quarter of consumers who chose the sustainable option, most did so because they believe organic/sustainable items are better for their health (65%) and better for the environment (51%).

Of the 75% of total shoppers who did *not* choose the sustainable loaf, three-quarters (76%) said it cost more than they were willing to spend. A further 27% said they "just prefer to buy regular bread."

Price > Everything Else

When digging deeper into the reasons behind their choices to buy the sustainable or non-sustainable loaf of bread, consumers were presented with many options beyond price to explain their decisions. But regardless of taste, benefits, brand, and availability, consumers were laser-focused on price above all. This likely relates to the deeply held perception that sustainable goods are more expensive than conventional ones (and the converse, that cheaper-priced goods aren't really sustainable).

If brands are able to be competitive on price, the focus then can be toward the next-most popular purchase drivers: taste, quality, value.

Reasons for Buying Sustainable

Why did you select the organic (sustainable) bread option for $4.99?

(sustainability/other)

	Total	Sustainability Unconcerned/Neutral n = 493	Sustainability Conscious n = 758	Values Segment n = 328	Convenience Segment n = 736	Health Segment n = 1124	Quality Segment n = 647
Organic (sustainable) items are better for my health	65%	60%	68%	74%	61%	68%	70%
Organic (sustainable) items are better for the environment	51%	41% ●	57%	68% ■	48%	52%	55%
Prefer to buy organic (sustainable)	46%	38%	52%	56% ■	43%	49%	53%
Reasonable price for an organic (sustainable) item	38%	37%	38%	37%	39%	37%	35%
Like the taste of organic (sustainable) items	29%	25%	32%	35% ■	28%	30%	33%

(generation)

	Total	Gen Z n = 200	Millennial n = 355	Gen X n = 316	Baby Boomers+ n = 380
Organic (sustainable) items are better for my health	65%	60%	61%	71%	66%
Organic (sustainable) items are better for the environment	51%	52%	51%	51%	50%
Prefer to buy organic (sustainable)	46%	42%	44%	48%	49%
Reasonable price for an organic (sustainable) item	38%	44%	40%	35%	34%
Like the taste of organic (sustainable) items	29%	26%	29%	31%	30%

■ = Over Index vs. Total (120 or Above)

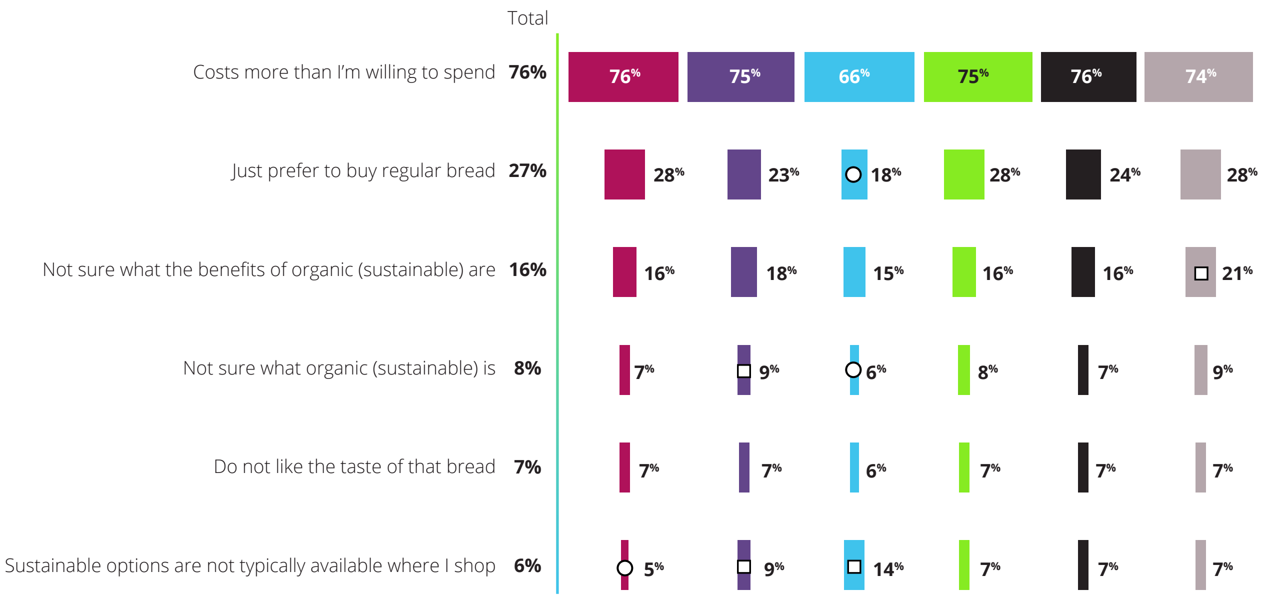
● = Under Index vs. Total (80 or Below)

Reasons for not Buying Sustainable

Why did you not select the organic (sustainable) bread option for $4.99?

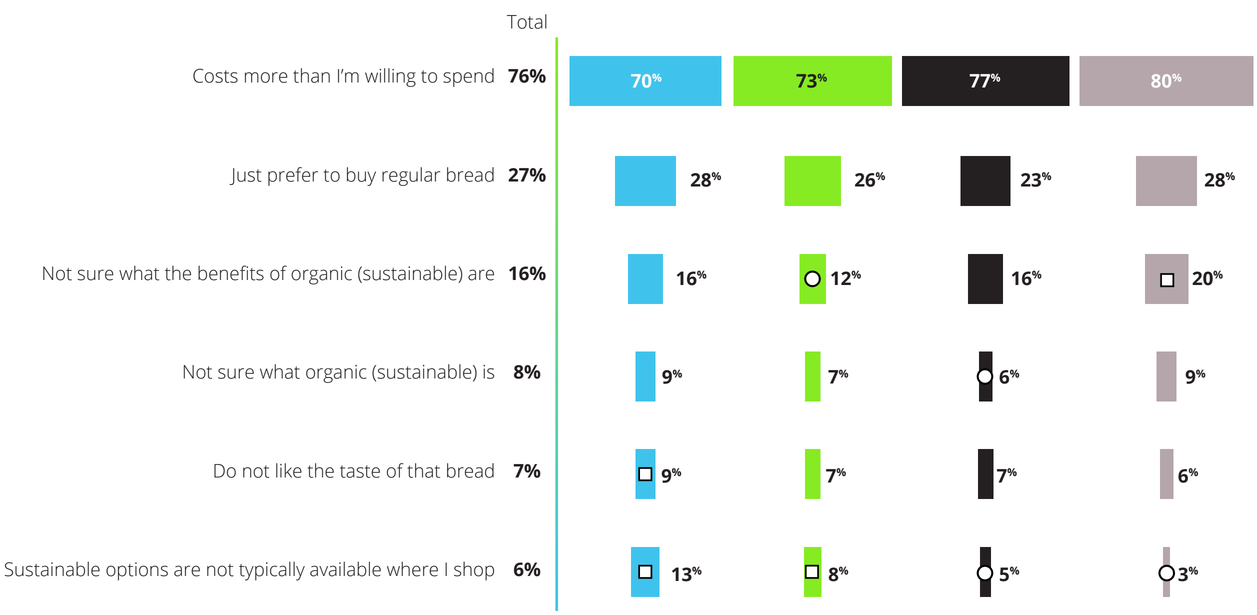
(sustainability/other)

Sustainability Unconcerned/Neutral n = 493
Sustainability Conscious n = 758
Values Segment n = 328
Convenience Segment n = 736
Health Segment n = 1124
Quality Segment n = 647



(generation)

Gen Z n = 200
Millennial n = 355
Gen X n = 316
Baby Boomers+ n = 380



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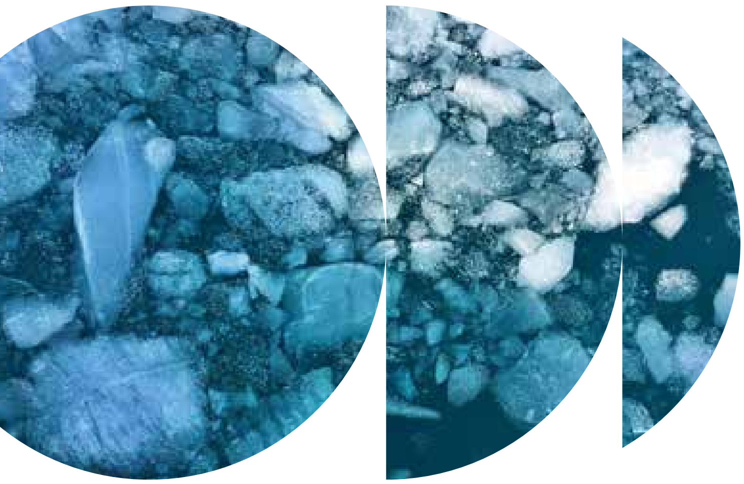
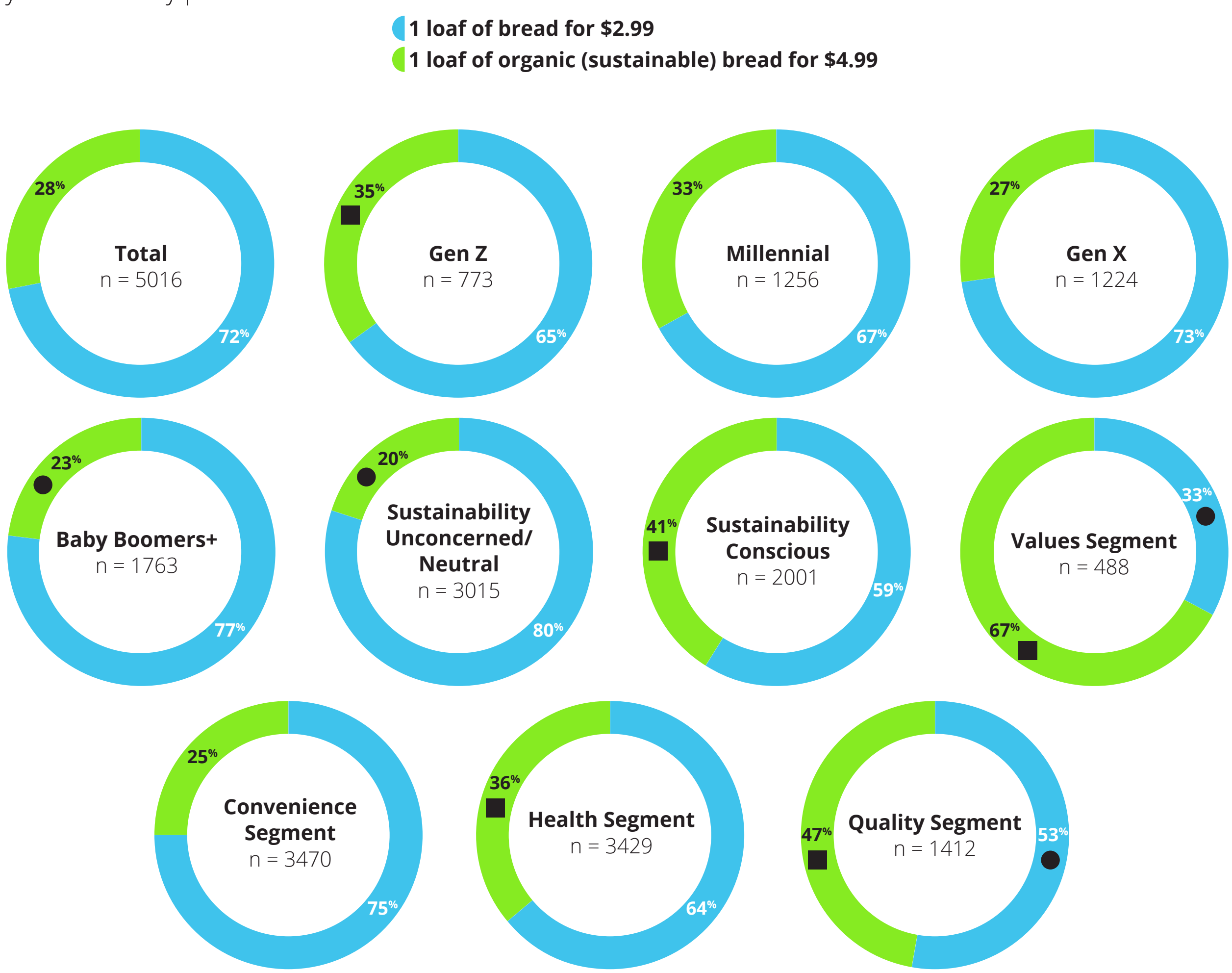


Price again wins out over brand for the majority of shoppers.

When presented with options from a trusted brand vs. an unknown brand, most respondents again chose the cheaper option: 72% would purchase the cheaper bread from a trusted brand; 73% would purchase the cheaper bread from an unknown brand.

Sustainability Willingness (Trusted Brand)

Now if these two options of bread were from a brand you trusted, which one would you most likely purchase?



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Sustainability Willingness (Unknown Brand)

Now if these two options of bread were both from a brand you were unfamiliar with, which one would you most likely purchase?

Motivators to buy sustainable are primarily around price and personal health benefits.

What would motivate shoppers to buy sustainable products? Again, one theme resounds: Price. Matching the price of non-sustainable items was chosen by most shoppers (76%), followed by offering discounts/coupons regularly for sustainable products (73%) and seeing the positive health/wellness benefits to them personally (68%). Environment, brand, and influencers ranked lowest.

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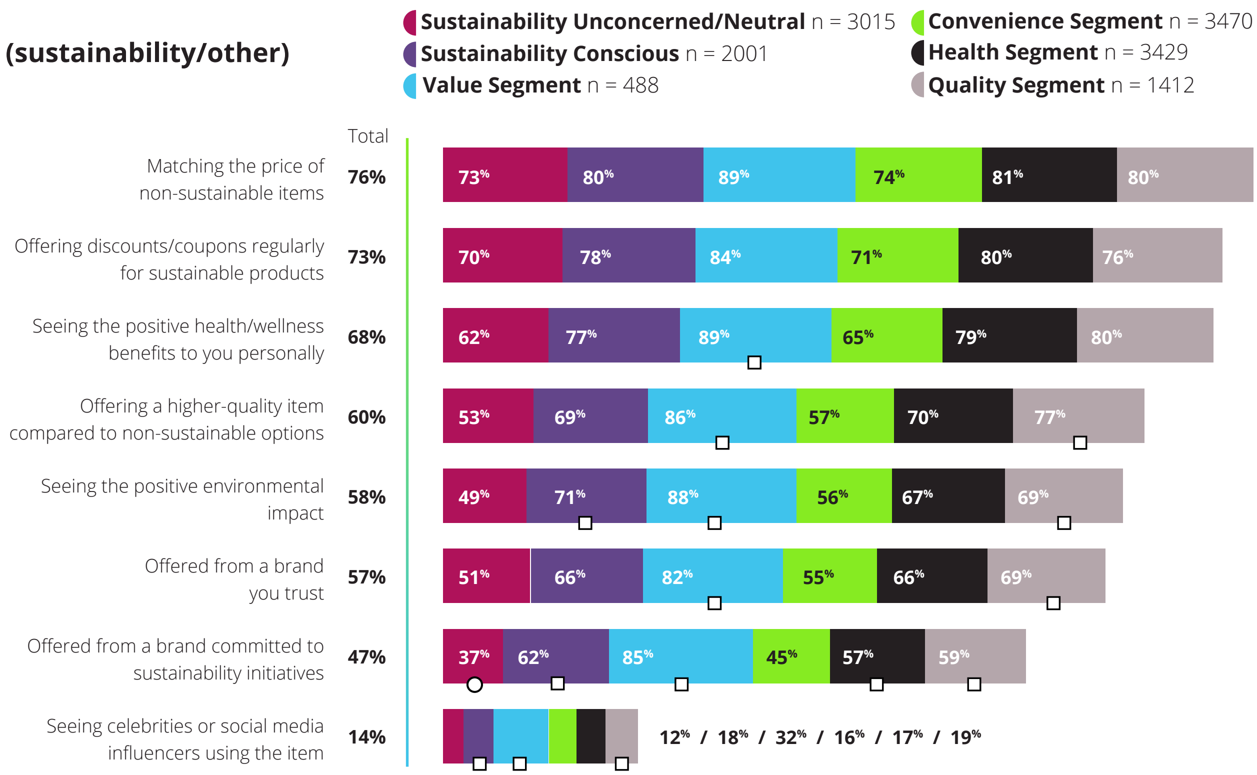
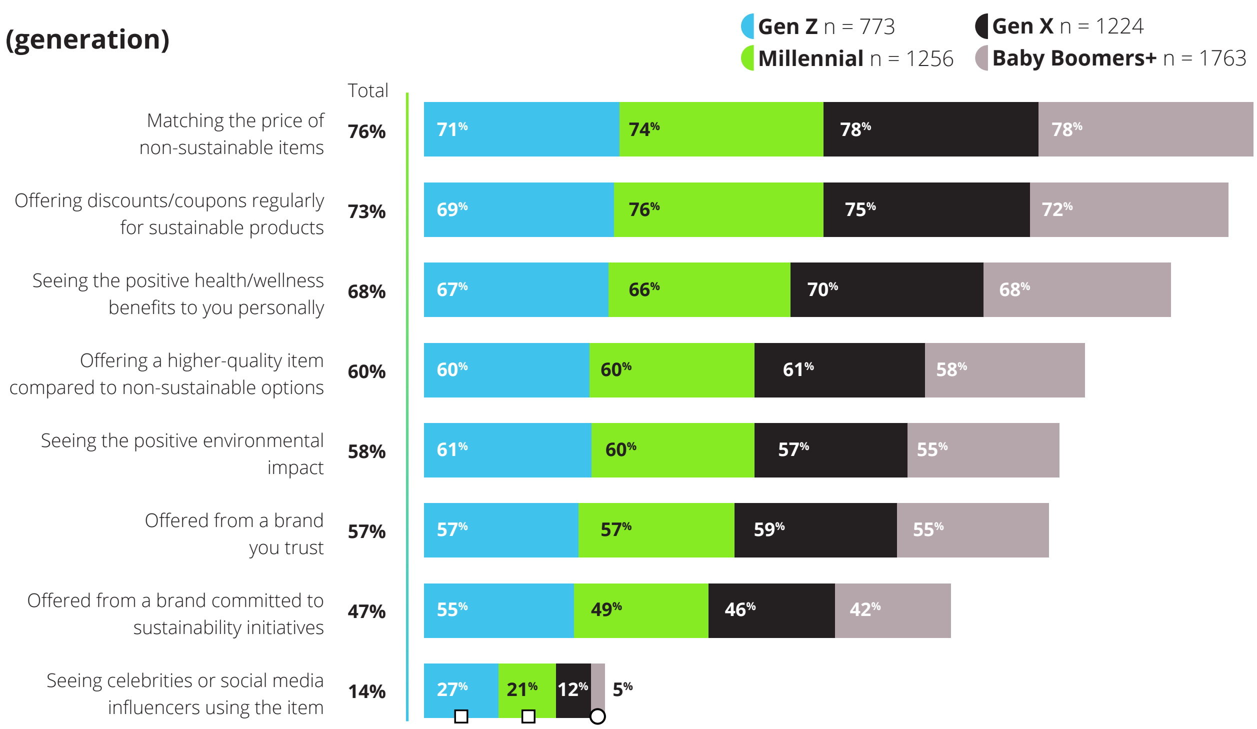
Motivating to Buy Sustainable Products (%Very/Somewhat)

How motivating would each of the following be to get you to buy more sustainable products?





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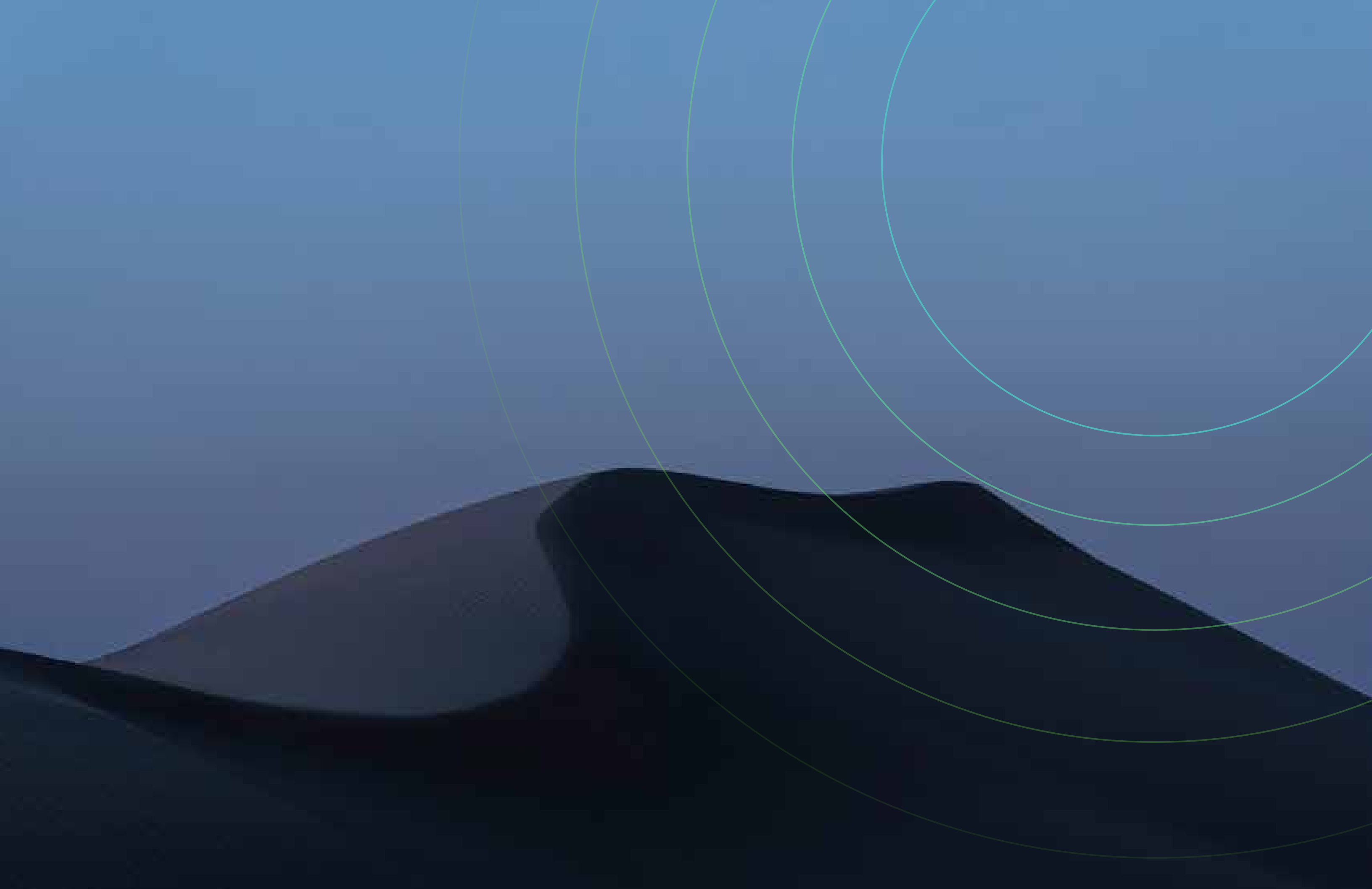
Summary + Implications

What does it all mean?

Cash is king, especially when it comes to food choices. Shoppers are more likely to put cheaper-priced items in their carts over organic/sustainable ones, even when a trusted brand is in the equation. It's also the main motivator to get consumers to buy more sustainable products, including price watching and offering discounts. Also important (though not as much as price) are personal health benefits.

How can brands use this data?

Weigh value, health, and price: Shoppers are feeling the crunch when it comes to grocery prices, but simply slashing prices may not be the answer. For brands that can be competitive with pricing, lead with the next-most popular purchase drivers: taste, value, quality—as well as the product's personal health benefits.



SECTION 5

Trust is the new currency.

What can sustainable companies do to illustrate sustainability and build credibility with consumers?

More than half of respondents noted that companies should invest in sustainable products and commit to the effort over time to be seen as credible.

What can companies do to gain credibility among shoppers as being sustainable? There's no overall consensus, though nearly two-thirds of respondents said companies should invest in producing products that are sustainable (59%) or commit to sustainability efforts over a long period of time (58%). Making donations and partnering with others (sustainable orgs, scientists/health experts, trusted media) ranked lowest.

Credible Actions for Company to Take (Ranked Top 3)

If a company wants to support sustainability initiatives, what do they need to do so that they are credible? Please rank the top 3 actions a company should take to be credible.

Gen Z n = 773
Millennial n = 1256
Gen X n = 1224
Baby Boomers+ n = 1763
Sustainability Unconcerned/Neutral n = 3015
Sustainability Conscious n = 2001

	Total	Gen Z	Millennial	Gen X	Baby Boomers+	Sustainability Unconcerned/Neutral	Sustainability Conscious
Invest in producing products that are sustainable	**59%**	48%	57%	62%	62%	59%	59%
Commit to sustainability efforts over a long period of time	**58%**	54%	53%	59%	61%	57%	58%
Build commitment to sustainability into their company values	**45%**	42%	44%	48%	45%	44%	46%
Partner with organizations who focus on sustainability development	**39%**	39%	38%	39%	40%	39%	39%
Partner with scientists and/or health experts	**33%**	40%	34%	30%	31%	34%	32%
Donate to research initiatives focused on sustainability	**21%**	25%	25%	20%	19%	21%	22%
Partner with trusted media companies to "get the word out" about the importance of using sustainable products	**21%**	23%	23%	19%	20%	21%	21%
Donate to organizations focused on sustainability efforts	**20%**	26%	23%	20%	15%	20%	21%

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Consumers view sustainability favorably. In the qualitative phase, however, they noted that they have a natural skepticism of brands claiming to be sustainable.

Consumers in the qualitative noted (unaided) that they're aware of tactics like greenwashing and that sustainability claims are used to market products. They want to support sustainability but are highly sensitive to feeling deceived. Overall, there can be brand trust, but it depends on a company's overarching efforts and reputation.

What actions can brands take to be more credible?

- **Transparency and honesty.** Consumers value clear, detailed information about a company's sustainability practices. Being upfront about areas for improvement builds credibility—consumers value harm reduction and don't expect perfection.

- **Third-party certifications.** Independent endorsements and certifications are seen as reliable indicators of authenticity, though not all consumers understand what these claims mean.

- **Consistency between actions and claims.** While some sustainability efforts are favorable, consumers seek a genuine commitment to sustainability. They're critical of companies that make small efforts but contradict them elsewhere, and they expect consistent movement toward comprehensive sustainable practices—even if progress is gradual.

- **Clear and accessible information.** Consumers want to understand the impact and importance of sustainability efforts more clearly (e.g., the impact of a third-party certification). This information can be difficult to find for some brands and products.

Summary + Implications

What does it all mean?

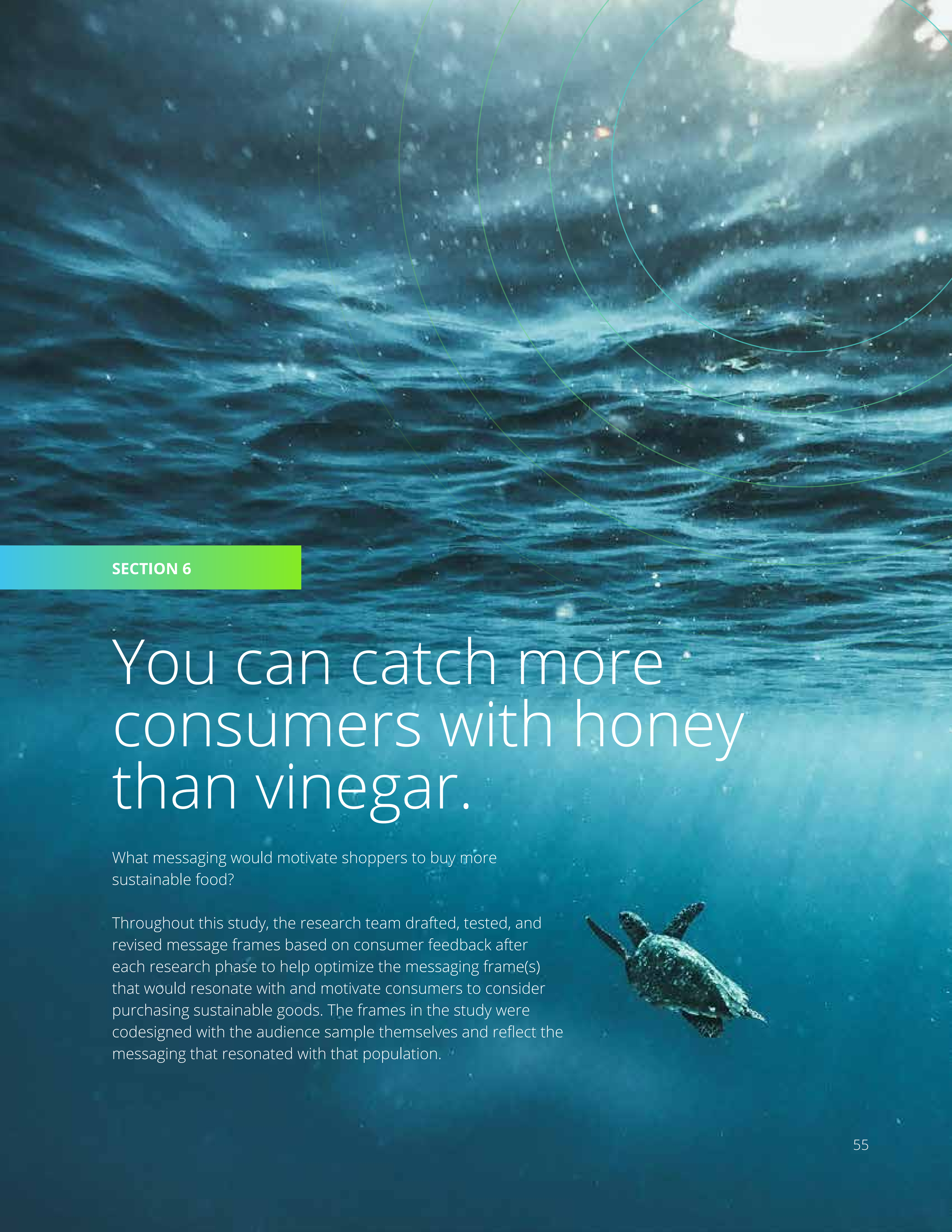
Trust is not an ethereal concept. Rather, it's a currency of exchange in the sustainability economy. Consumers are more likely to spend more when they can trust the brand and what it stands for, and if the brand has illustrated a commitment to real change. It's as if the consumer is willing to pay more to "buy" the trust they perceive.

How can brands use this data?

Provide proof: Many consumers are looking for clear, measurable evidence of sustainability efforts. Brands should provide detailed information about their practices and impacts to build trust and credibility.

Address skepticism: Large companies often face skepticism regarding their sustainability efforts due to perceived profit-only motives. These companies should demonstrate substantial commitments and transparency to help overcome this perception.

Look at loyalty: Beyond purchases, what drives brand loyalty? The temptation to focus on how product sustainability attributes impact purchase intent should be complemented by a similar analysis and emphasis on loyalty.



SECTION 6

You can catch more consumers with honey than vinegar.

What messaging would motivate shoppers to buy more sustainable food?

Throughout this study, the research team drafted, tested, and revised message frames based on consumer feedback after each research phase to help optimize the messaging frame(s) that would resonate with and motivate consumers to consider purchasing sustainable goods. The frames in the study were codesigned with the audience sample themselves and reflect the messaging that resonated with that population.

A message frame is a messaging/narrative concept used to test various language and phrasing. This study tested **foundational message frames** designed to introduce the concept of sustainability, as well as **conditional message frames** to further explain and strengthen the foundational frame and address any potential barriers or biases among consumers.

Qualitative Message Frame Testing

In the qualitative phase, each participant was shown the foundational frame and one assigned conditional frame (of six total options) based on their self-reported sustainability behaviors and practices. In-depth feedback on the initial message frames during the qualitative phase informed strategic revisions, which were then tested in the quantitative survey.

The testing of message frames was specifically intended to determine the key narratives, words, and phrasing that most resonate with and motivate consumers to make sustainable purchases.

For more details on participant responses and reactions to each individual message frame, see the appendix at the end of this report.

Foundational

As consumers, we're most often focused on the "now," buying what we need or want at this point in time. But what impact do those choices have on your life, your family, your wallet, our planet?

Sustainable choices can be considered as those choices which keep the environment in mind—like eating seasonal, locally sourced foods; gardening and composting; choosing biodegradable, minimally packaged products; purchasing from brands that are "eco-friendly"; or avoiding fast fashion—and are sometimes defined as meeting our immediate needs and reducing negative impacts to our families and communities in the longer term.

Sustainable choices can be considered to help make the air safer to breathe and water safer to drink; to power our homes more efficiently and less expensively; and to aid in boosting the economy—and our wallets.

Your everyday choices have a major impact on your life, your family, and our world.

Conditional Frame 1
Eco Friendly Products

Shown to respondents who self-selected that they avoid single use plastics or other single-use items, own/ease a hybrid or fully electric vehicle, use energy efficient appliances, light bulbs, etc., look for products with a 'lower carbon' or 'net zero' claim, install electric appliances, have an all-electric home.

Every purchase decision you make has an impact that reaches far beyond your wallet. The air you breathe. The water you drink.
The environment.

Prioritizing items that are locally sourced, made from recycled or reusable materials (water bottles, shopping bags, furniture, clothing), or produced using lower emissions helps reduce negative impacts on the environment that directly affect you and your family.

The next time you make a purchase, big or small, consider its eco-friendliness.

Conditional Frame 2
Ethical Practices

Shown to respondents who self-selected that they avoid single use use plastics or other single-use items, own/ease a hybrid or fully electric vehicle, use energy efficient appliances, light bulbs, etc., look for products with a 'lower carbon' or 'net zero' claim, install electric appliances, have an all-electric home.

When making purchasing decisions, how much do you take the ethical practices of the company that makes that product into consideration?

Choose to buy products from companies that commit to helping the environment, and those that understand the importance of ethical labor practices like fair pay and safe working conditions. Their products, methods of production, labor, and materials have a major impact on you and your family's health: the food you eat. The water you drink. The air you breathe. These companies also help provide a living income to the communities that produce the products we use every day.

The next time you're clicking "add to cart," look for brands committed to sustainability and ethical labor practices like carbon-neutral, fair trade, or zero/low waste.

Conditional Frame 3
Slow Fashion & Circular Economy

Shown to respondents who self-selected that they thrift/buy previously worn/used, avoid fast fashion.

85% of clothing in the U.S. ends up in landfills.

Fast fashion (e.g., where companies mass produce clothing cheaply) is a big contributor to waste—and contributes to water and carbon dioxide pollution, microplastics, poor worker practices, and more.

When you commit to shopping second-hand, participating in clothing rental and repair programs, or only buying from companies that produce clothing using sustainable materials and fair labor, you're reducing waste, protecting our water, supporting local businesses and human rights. Now that's a decision you can feel good about making.

Conditional Frame 4
Green packaging & waste reduction

Shown to respondents who self-selected that they look for products that come in recycled packaging.

Sustainable shopping habits aren't only about the food or item you're adding to your cart. One that's often overlooked is packaging, which makes up about 30% of waste. While materials like cardboard boxes have low environmental impact, many other materials (think plastic packaging and Styrofoam packing peanuts) will not biodegrade, and they're not recyclable.

When you're considering your next purchase, opt for minimal, compostable, or recyclable packaging and avoid excessive use of plastic.

Conditional Frame 5
Organic & Regenerative Farming

Shown to respondents who self-selected that they buy organic.

We all want the best for our families—including our food.

Some farming practices—like organic farming or regenerative farming—reduce or eliminate the need for synthetic chemicals and fertilizers and improve soil health and biodiversity. This doesn't just benefit your body; it also benefits the soil your food grows in, the air you breathe, and the water you drink.

When you buy organic foods and support farms that prioritize soil health and biodiversity, you're paving the way for a healthy family.

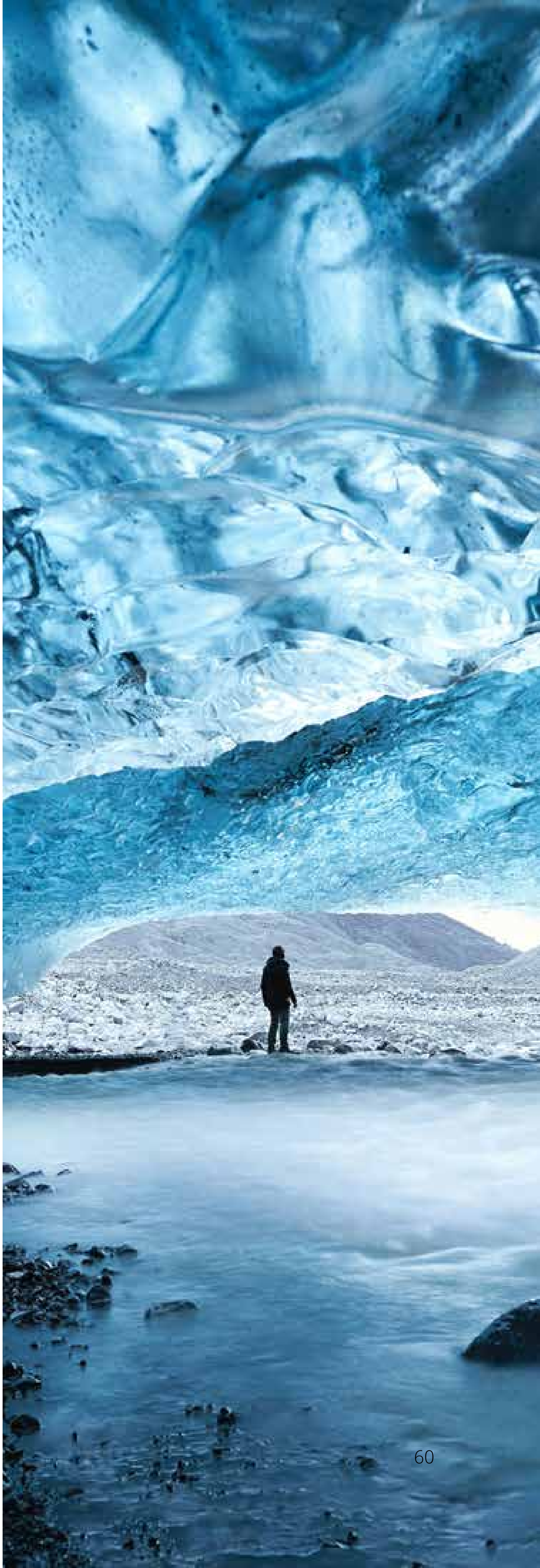
Conditional Frame 6
Zero-waste lifestyle

Shown to respondents who self-selected that they recycle items, look for products with a 'lower carbon' or 'net zero' claim.

A zero-waste lifestyle not only benefits the planet; it helps your home and your health by reducing clutter and promoting financial savings.

Use refillable and reusable containers. Switch to compostable or reusable personal care products like bamboo toothbrushes, cloth napkins, or menstrual cups. Repair broken items locally instead of throwing them out. Donate unused items and buy second-hand.

Reducing waste and resources starts at home, though its impacts are far-reaching.



Quantitative Message Frame Testing & Key Findings

In the qualitative phase, consumers indicated they're most compelled by messaging that's clear and concise, easy to understand, clearly shows the benefits of taking action, and feels relevant and accessible to their lives.

While the message frames presented in the qualitative phase were broadly related to sustainability, the research team sought to zero in on a product segment of sustainability that's easier to understand and more relatable to a larger consumer audience: groceries. Specific messaging feedback from the qualitative research, coupled with this pointed focus on grocery purchases, led to the creation of an optimized foundational frame and three edited conditional frames in the quantitative phase: eco-friendly products, organic and regenerative farming, and zero-waste lifestyle.

In this phase, all respondents were shown the foundational frame, followed by all three conditional frames in a random order. For each frame, shoppers were asked to highlight the words and phrases they liked and disliked.

Messaging Key Findings | Quantitative

In the foundational message, most shoppers gravitated toward language highlighting the positive impacts of their choices.

The phrases most shoppers liked were empowering in nature: "We have the power to positively impact..." and "making sustainable choices can help make the air safer to breathe and water safer to drink."

Some respondents disliked mentions of specific actions (gardening/composting, purchasing from specific brands) and sustainability relating to powering homes to benefit the economy. And overall, consumers have mixed emotions towards everyday individual choices having a major impact.

Foundational Frame | Highlighter Exercise

Please highlight the specific words or phrases in this message that you like the most, or that sparks your interest in sustainability. Then, please highlight the specific words or phrases in this message that you do not like, or that make you less interested in sustainability.

We have the power to positively impact (31%) | our families, | our health, | our wallets, | and even our planet | —simply by making responsible, | sustainable choices. |

When we make choices with the environment in mind |—like eating seasonal, locally sourced foods; | gardening and composting; (9%) | choosing minimally packaged products; | using recycled goods; | or purchasing from brands that are committed to sustainability (12%) |—we meet our immediate needs | and reduce negative impacts to our families and communities. |

Making sustainable choices can help make the air safer to breathe (43%) | and water safer to drink. (37%) | It helps power our homes more efficiently and less expensively. (9%) | It aids in boosting the economy (and our wallets), (13%) | and it adds to overall health improvements. |

Your everyday choices have a major impact on your life, your family, and our world. (27%/10%) |

Respondents were asked to evaluate the frame based on what like and what they dislike about the frame.

LIKES: Above average across all segments for this group

POLARIZING: Above average for LIKES & DISLIKES across all segments for this group

DISLIKES: Above average across all segments for this group

18% like nothing | **40%** dislike nothing

Reactions to phrasing in the conditional frames were mixed, though consumers were inclined to like wording about the benefits of zero-waste.

There was no clear consensus among the conditional frames of the types of language consumers liked, leading to some contradictions across the three.

In the Eco-Friendly Products frame, a third of respondents gravitated toward the sentiment that every purchase decision has a larger impact, though a handful of respondents were also negative toward that phrase. Some disliked phrases focused on dictating where to purchase from or that their individual choices add up.

Conditional Frame: Eco-Friendly Products | Highlighter Exercise

Please highlight the specific words or phrases in this message that you like the most, or that sparks your interest in sustainability. Then, please highlight the specific words or phrases in this message that you do not like, or that make you less interested in sustainability.

Every purchase decision you make has an impact that reaches far beyond your wallet. (32%/13%) | The air you breathe. | The water you drink. | Your family's health. | The environment. |

When you shop, prioritize items that are locally sourced, (10%) | made from recycled or reusable materials, | produced using lower emissions, | or use less packaging | to help reduce negative impacts on the environment that directly affect you and your family. |

Consider purchasing from companies that commit to helping the environment. (15%) | Your choices add up, and together they can positively impact our world. (11%) |

Respondents were asked to evaluate the frame based on what like and what they dislike about the frame.

LIKES: Above average across all segments for this group

POLARIZING: Above average for LIKES & DISLIKES across all segments for this group

DISLIKES: Above average across all segments for this group

13% like nothing | **46%** dislike nothing

In the Organic & Regenerative Farming frame, consumers leaned toward reducing or eliminating the need for synthetic chemicals/fertilizers. While half of respondents said they didn't dislike anything, some didn't like phrases that tied family and health to food: "we all want the best for our families—including food" or "when you buy organic foods, you're paving the way for a healthy family and world."

Conditional Frame: Organic & Regenerative Farming | Highlighter Exercise

Please highlight the specific words or phrases in this message that you like the most, or that sparks your interest in sustainability. Then, please highlight the specific words or phrases in this message that you do not like, or that make you less interested in sustainability.

We all want the best for our families—including our food. (13%) |

Farming practices like organic farming | and regenerative farming | reduce or eliminate the need for synthetic chemicals and fertilizers (41%) | and improve soil health and biodiversity. | This doesn't just benefit your body; | it also benefits the soil your food grows in, | the air you breathe, | the water you drink, | and the earth and wildlife around us.|

When you buy organic foods, you're paving the way for a healthy family and world. (20%) |

Respondents were asked to evaluate the frame based on what like and what they dislike about the frame.

LIKES: Above average across all segments for this group

POLARIZING: Above average for LIKES & DISLIKES across all segments for this group

DISLIKES: Above average across all segments for this group

12% like nothing | **50%** dislike nothing

The Zero-Waste Lifestyle frame had the most liked phrases of the three, with shoppers most liking language describing the benefits of zero-waste (planet, saving money) and how to adhere to it (reusable containers, reducing waste at home). A quarter of respondents didn't like specific mentions of products to use, and some didn't like the specific call to action (buy sustainable, learn more).

Conditional Frame: Zero-Waste Lifestyle | Highlighter Exercise

Please highlight the specific words or phrases in this message that you like the most, or that sparks your interest in sustainability. Then, please highlight the specific words or phrases in this message that you do not like, or that make you less interested in sustainability.

A zero-waste lifestyle not only benefits the planet; (31%) | it helps your home and your health: | reducing clutter, | saving money, (33%) | promoting healthier eating. |

Use refillable and reusable containers. (31%) | Reduce food and grocery waste. | Switch to compostable or reusable products like bamboo toothbrushes, cloth napkins, or menstrual cups. (25%) | Repair broken items locally instead of throwing them out.| Donate unused items, |and buy second-hand.|

Reducing waste and resources starts at home, and its impacts are far-reaching. (37%) |

'SUSTAINABILITY CONSCIOUS': That's why I'll continue buying sustainable products for myself and my family. (13%) |

NOT 'SUSTAINABILITY CONSCIOUS': LEARN more about how sustainable products can benefit you and your family. (11%) |

Respondents were asked to evaluate the frame based on what like and what they dislike about the frame.

LIKES: Above average across all segments for this group
POLARIZING: Above average for LIKES & DISLIKES across all segments for this group
DISLIKES: Above average across all segments for this group

11% like nothing | **40%** dislike nothing

Two-thirds of consumers would be motivated to learn more about sustainability and would buy more sustainable items after reading the foundational frame.

Just under two-thirds (64%) of total shoppers say they'd be motivated to learn more about sustainability after reading the foundational frame. A similar amount (61%) say the message motivates them to buy sustainable goods, and more so for the same segments as relevance and motivation to learn: non-White, Sustainability Conscious, in the Values, Health, or Quality segments.

Foundational Message: Motivation to Learn

After reading this message, how motivated are you to learn more about sustainability?

	Total n = 5016	**Gen Z** n = 773	**Millennial** n = 1256	**Gen X** n = 1224	**Baby Boomers+** n = 1763
Very unmotivated	5%	2% ●	3% ●	5%	8% ■
Somewhat unmotivated	5%	4% ●	3% ●	6%	6% ■
Bottom 2 Box (net)	10%	6% ●	6% ●	11%	14% ■
Neutral	26%	23%	26%	26%	27%
Somewhat motivated	39%	42%	42%	36%	39%
Very motivated	25%	29%	26%	26%	20%
Top 2 Box (net)	64%	71%	68%	63%	59%

	White, Non-Hispanic n =3512	**Hispanic** n =688	**Black** n =479	**AAPI** n =322	**AI/AN** n =45	**Other** n =161
Very unmotivated	6% ■	2% ●	2% ●	2% ●	2% ●	3% ●
Somewhat unmotivated	6%	3% ●	3% ●	3% ●	4%	4%
Bottom 2 Box (net)	12% ■	5% ●	5% ●	5% ●	7% ●	7% ●
Neutral	28%	20% ●	23%	24%	24%	20% ●
Somewhat motivated	39%	40%	33%	46%	36%	40%
Very motivated	21%	36% ■	39% ■	26%	33% ■	32% ■
Top 2 Box (net)	60%	75%	72%	71%	69%	72%

	Sustainability Unconcerned/ Neutral n =3015	**Sustainability Conscious** n =2001	**Values Segment** n =488	**Convenience Segment** n =3470	**Health Segment** n =3429	**Quality Segment** n =1412
Very unmotivated	7% ■	2% ●	1% ●	5%	3% ●	5%
Somewhat unmotivated	7% ■	3% ●	1% ●	5%	3% ●	4% ●
Bottom 2 Box (net)	14% ■	4% ●	1% ●	10%	7% ●	8%
Neutral	31%	19% ●	8% ●	27%	20% ●	19% ●
Somewhat motivated	40%	38%	36%	39%	42%	38%
Very motivated	15% ●	38% ■	54% ■	24%	31% ■	35% ■
Top 2 Box (net)	55%	77% ■	90% ■	63%	73%	72%

■ = Over Index vs. Total (120 or Above)
● = Under Index vs. Total (80 or Below)

Foundational Message: Motivation to Buy Sustainable

After reading this message, how motivated are you to buy sustainable items?

	Total n = 5016	Gen Z n = 773	Millennial n = 1256	Gen X n = 1224	Baby Boomers+ n = 1763
Very unmotivated	5%	2% ●	3% ●	5%	7% ■
Somewhat unmotivated	5%	5%	3% ●	7% ■	6%
Bottom 2 Box (net)	10%	7% ●	6% ●	12%	13% ■
Neutral	29%	25%	29%	28%	30%
Somewhat motivated	38%	40%	39%	36%	38%
Very motivated	23%	27%	25%	24%	19%
Top 2 Box (net)	61%	68%	64%	60%	56%

	White, Non-Hispanic n =3512	Hispanic n =688	Black n =479	AAPI n =322	AI/AN n =45	Other n =161
Very unmotivated	6% ■	2% ●	2% ●	2% ●	2% ●	4% ●
Somewhat unmotivated	6%	4% ●	2% ●	3% ●	9% ■	4% ●
Bottom 2 Box (net)	12% ■	6% ●	4% ●	4% ●	11%	8% ●
Neutral	30%	25%	27%	26%	33%	25%
Somewhat motivated	37%	40%	35%	49% ■	36%	39%
Very motivated	21%	29% ■	34% ■	20%	20%	28% ■
Top 2 Box (net)	58%	70%	70%	69%	56%	67%

	Sustainability Unconcerned/ Neutral n =3015	Sustainability Conscious n =2001	Values Segment n =488	Convenience Segment n =3470	Health Segment n =3429	Quality Segment n =1412
Very unmotivated	7% ■	2% ●	0% ●	5%	3% ●	4%
Somewhat unmotivated	7% ■	3% ●	1% ●	6%	4% ●	4% ●
Bottom 2 Box (net)	14% ■	5% ●	2% ●	11%	7% ●	8% ●
Neutral	34%	21% ●	9% ●	30%	21% ●	21% ●
Somewhat motivated	39%	37%	31%	38%	42%	36%
Very motivated	13% ●	37% ■	59% ■	21%	30% ■	35% ■
Top 2 Box (net)	52%	75% ■	90% ■	59%	72%	71%

Shoppers found the conditional frames less motivating than the foundational frame.

Just over half of consumers say a conditional frame would motivate them to learn more, again especially among respondents who are sustainably conscious and in the Values Segment.

Similarly, adding conditional frames increases shopper motivation to buy sustainable goods for about half of respondents (especially those who are Sustainable Conscious and in the Values segment).

■ = Over Index vs. Total (120 or Above)
● = Under Index vs. Total (80 or Below)

Conditional Message Evaluation: Motivation to Learn

And if this option was added to the message, how does it change how motivating it is for you to learn more about sustainability?

Eco-Friendly Products

	Total n = 5016	**Gen Z** n = 773	**Millennial** n = 1256	**Gen X** n = 1224	**Baby Boomers+** n = 1763
Much less motivating	2%	1% ●	2%	2%	3% ■
Somewhat less motivating	4%	5% ■	4%	3%	3%
Bottom 2 Box (net)	6%	6%	6%	6%	6%
Has no impact	42%	35%	38%	44%	46%
Somewhat more motivating	36%	38%	37%	35%	35%
Much more motivating	17%	21% ■	20%	16%	14%
Top 2 Box (net)	53%	59%	56%	51%	49%

	White, Non-Hispanic n =3512	**Hispanic** n =688	**Black** n =479	**AAPI** n =322	**AI/AN** n =45	**Other** n =161
Very unmotivated	3% ■	1% ●	1% ●	1% ●		2% ■
Somewhat unmotivated	4%	4%	2% ●	4%	7% ■	2% ●
Bottom 2 Box (net)	7%	5%	3% ●	5%	7%	4% ●
Neutral	44%	32% ●	33% ●	37%	36%	37%
Somewhat motivated	34%	41%	36%	44% ■	33%	35%
Very motivated	15%	22% ■	27% ■	14%	24% ■	23% ■
Top 2 Box (net)	49%	63% ■	63% ■	58%	58%	58%

	Sustainability Unconcerned/ Neutral n =3015	**Sustainability Conscious** n =2001	**Values Segment** n =488	**Convenience Segment** n =3470	**Health Segment** n =3429	**Quality Segment** n =1412
Very unmotivated	3% ■	1% ●	1% ●	2%	1% ●	2% ●
Somewhat unmotivated	4%	3%	3% ●	4%	3%	3%
Bottom 2 Box (net)	7% ■	4% ●	4% ●	6%	5%	5%
Neutral	48%	32% ●	18% ●	42%	34%	35%
Somewhat motivated	34%	38%	40%	36%	40%	37%
Very motivated	11% ●	25% ■	38% ■	16%	21% ■	23% ■
Top 2 Box (net)	45%	64% ■	78% ■	53%	61%	60%

■ = Over Index vs. Total (120 or Above)

● = Under Index vs. Total (80 or Below)

Conditional Message Evaluation: Motivation to Learn

And if this option was added to the message, how does it change how motivating it is for you to learn more about sustainability?

Organic & Regenerative Farming

	Total n = 5016	Gen Z n = 773	Millennial n = 1256	Gen X n = 1224	Baby Boomers+ n = 1763
Much less motivating	2%	2% ●	2%	2%	3% ■
Somewhat less motivating	4%	7% ■	3%	2% ●	3%
Bottom 2 Box (net)	6%	9% ■	5%	4% ●	6%
Has no impact	38%	34%	36%	39%	42%
Somewhat more motivating	37%	35%	39%	37%	36%
Much more motivating	19%	22%	20%	20%	16%
Top 2 Box (net)	56%	57%	59%	57%	52%

	White, Non-Hispanic n =3512	Hispanic n =688	Black n =479	AAPI n =322	AI/AN n =45	Other n =161
Very unmotivated	3%	1% ●	1% ●	1% ●		1% ●
Somewhat unmotivated	4%	4%	3% ●	2% ●	4%	5% ■
Bottom 2 Box (net)	7%	5%	4% ●	3% ●	4% ●	6%
Neutral	41%	30% ●	31%	37%	40%	27% ●
Somewhat motivated	36%	39%	35%	44% ■	29% ●	40%
Very motivated	16%	26% ■	29% ■	16%	27% ■	28% ■
Top 2 Box (net)	53%	65%	65%	60%	56%	68% ■

	Sustainability Unconcerned/ Neutral n =3015	Sustainability Conscious n =2001	Values Segment n =488	Convenience Segment n =3470	Health Segment n =3429	Quality Segment n =1412
Very unmotivated	3% ■	1% ●	0% ●	2%	1% ●	1% ●
Somewhat unmotivated	5% ■	3% ●	2% ●	4%	3%	3% ●
Bottom 2 Box (net)	7% ■	4% ●	2% ●	6%	5% ●	4% ●
Neutral	44%	29% ●	19% ●	40%	31%	31%
Somewhat motivated	35%	40%	39%	36%	41%	38%
Very motivated	13% ●	27% ■	40% ■	18%	23% ■	26% ■
Top 2 Box (net)	48%	67% ■	78% ■	54%	64%	65%

■ = Over Index vs. Total (120 or Above)

● = Under Index vs. Total (80 or Below)

Conditional Message Evaluation: Motivation to Learn

And if this option was added to the message, how does it change how motivating it is for you to learn more about sustainability?

Zero-Waste Lifestyle

	Total n = 5016	Gen Z n = 773	Millennial n = 1256	Gen X n = 1224	Baby Boomers+ n = 1763
Much less motivating	3%	2% ●	3% ●	4%	4%
Somewhat less motivating	5%	6% ■	5%	5%	5%
Bottom 2 Box (net)	8%	9%	7%	9%	8%
Has no impact	38%	31%	35%	39%	43%
Somewhat more motivating	37%	40%	40%	35%	35%
Much more motivating	17%	21% ■	19%	18%	14% ●
Top 2 Box (net)	54%	61%	58%	52%	49%

	White, Non-Hispanic n =3512	Hispanic n =688	Black n =479	AAPI n =322	AI/AN n =45	Other n =161
Very unmotivated	4%	2% ●	2% ●	0% ●	9% ■	3%
Somewhat unmotivated	5%	5%	4%	2% ●	4%	6%
Bottom 2 Box (net)	9%	7%	6% ●	3% ●	13% ■	9%
Neutral	40%	32%	29% ●	34%	40%	33%
Somewhat motivated	36%	38%	39%	43%	18% ●	35%
Very motivated	14%	24% ■	26% ■	20%	29% ■	24% ■
Top 2 Box (net)	51%	61%	65% ■	63%	47%	58%

	Sustainability Unconcerned/ Neutral n =3015	Sustainability Conscious n =2001	Values Segment n =488	Convenience Segment n =3470	Health Segment n =3429	Quality Segment n =1412
Very unmotivated	4% ■	2% ●	1% ●	3%	3% ●	3%
Somewhat unmotivated	5%	4%	4%	5%	5%	4%
Bottom 2 Box (net)	10%	6% ●	5% ●	8%	7%	7%
Neutral	44%	29% ●	19% ●	38%	31%	32%
Somewhat motivated	35%	39%	40%	38%	40%	39%
Very motivated	11% ●	25% ■	37% ■	16%	21% ■	22% ■
Top 2 Box (net)	47%	65% ■	77% ■	54%	61%	61%

■ = Over Index vs. Total (120 or Above)
● = Under Index vs. Total (80 or Below)

Conditional Message Evaluation: Motivation to Buy

And if this option was added to the message, how does it change how motivating it is for you to buy sustainable items?

Eco-Friendly Products

	Total n = 5016	**Gen Z** n = 773	**Millennial** n = 1256	**Gen X** n = 1224	**Baby Boomers+** n = 1763
Much less motivating	2%	2% ●	2%	2%	3% ■
Somewhat less motivating	4%	5% ■	4% ■	3%	3% ●
Bottom 2 Box (net)	6%	7%	6%	5%	5%
Has no impact	42%	35%	39%	45%	47%
Somewhat more motivating	36%	39%	39%	34%	35%
Much more motivating	16%	20% ■	17%	16%	13%
Top 2 Box (net)	52%	58%	55%	50%	48%

	White, Non-Hispanic n =3512	**Hispanic** n =688	**Black** n =479	**AAPI** n =322	**AI/AN** n =45	**Other** n =161
Very unmotivated	3%	1% ●	1% ●	2% ●		2%
Somewhat unmotivated	4%	3%	3% ●	2% ●	4% ■	4%
Bottom 2 Box (net)	6%	5%	4% ●	3% ●	4% ●	6%
Neutral	45%	36%	33% ●	38%	47%	41%
Somewhat motivated	35%	39%	37%	45% ■	24% ●	30%
Very motivated	14%	21% ■	26% ■	13%	24% ■	22% ■
Top 2 Box (net)	49%	60%	63% ■	58%	49%	53%

	Sustainability Unconcerned/ Neutral n =3015	**Sustainability Conscious** n =2001	**Values Segment** n =488	**Convenience Segment** n =3470	**Health Segment** n =3429	**Quality Segment** n =1412
Very unmotivated	3% ■	1% ●	1% ●	2%	2% ●	2% ●
Somewhat unmotivated	4%	3% ●	3% ●	4%	3%	3%
Bottom 2 Box (net)	7%	4% ●	4% ●	6%	5%	5% ●
Neutral	49%	32% ●	19% ●	43%	35%	36%
Somewhat motivated	33%	40%	43%	37%	41%	39%
Very motivated	11% ●	23% ■	34% ■	15%	19% ■	20% ■
Top 2 Box (net)	44%	63% ■	77% ■	52%	60%	60%

■ = Over Index vs. Total (120 or Above)
● = Under Index vs. Total (80 or Below)

Conditional Message Evaluation: Motivation to Buy

And if this option was added to the message, how does it change how motivating it is for you to buy sustainable items?

Organic & Regenerative Farming

	Total n = 5016	**Gen Z** n = 773	**Millennial** n = 1256	**Gen X** n = 1224	**Baby Boomers+** n = 1763
Much less motivating	2%	2%	2%	2%	3% ■
Somewhat less motivating	3%	6% ■	3%	3% ●	3% ●
Bottom 2 Box (net)	6%	8% ■	5%	4% ●	5%
Has no impact	40%	36%	38%	41%	44%
Somewhat more motivating	36%	37%	38%	34%	36%
Much more motivating	18%	19%	18%	20%	15%
Top 2 Box (net)	54%	56%	56%	54%	51%

	White, Non-Hispanic n =3512	**Hispanic** n =688	**Black** n =479	**AAPI** n =322	**AI/AN** n =45	**Other** n =161
Very unmotivated	3% ■	1% ●	1% ●	1% ●	2%	1% ●
Somewhat unmotivated	4%	4%	3%	2% ●	4% ■	4%
Bottom 2 Box (net)	6%	4% ●	4% ●	2% ●	7%	4% ●
Neutral	43%	32% ●	34%	38%	33%	27% ●
Somewhat motivated	35%	39%	36%	44% ■	40%	40%
Very motivated	16%	25% ■	27% ■	16%	20%	28% ■
Top 2 Box (net)	51%	64%	62%	60%	60%	68% ■

	Sustainability Unconcerned/ Neutral n =3015	**Sustainability Conscious** n =2001	**Values Segment** n =488	**Convenience Segment** n =3470	**Health Segment** n =3429	**Quality Segment** n =1412
Very unmotivated	3% ■	1% ●	0% ●	2%	1% ●	1% ●
Somewhat unmotivated	4%	3% ●	3% ●	4%	3%	3% ●
Bottom 2 Box (net)	7%	4% ●	3% ●	6%	4% ●	4% ●
Neutral	47%	30% ●	20% ●	41%	33%	33%
Somewhat motivated	34%	40%	37%	36%	40%	38%
Very motivated	12% ●	26% ■	40% ■	17%	22% ■	25% ■
Top 2 Box (net)	46%	66% ■	77% ■	53%	63%	63%

■ = Over Index vs. Total (120 or Above)

● = Under Index vs. Total (80 or Below)

Conditional Message Evaluation: Motivation to Buy

And if this option was added to the message, how does it change how motivating it is for you to buy sustainable items?

Zero-Waste Lifestyle

	Total n = 5016	**Gen Z** n = 773	**Millennial** n = 1256	**Gen X** n = 1224	**Baby Boomers+** n = 1763
Much less motivating	3%	2% ●	3%	4% ■	4%
Somewhat less motivating	5%	8% ■	5%	5%	4%
Bottom 2 Box (net)	8%	9%	7%	8%	8%
Has no impact	39%	33%	37%	41%	43%
Somewhat more motivating	36%	38%	38%	33%	36%
Much more motivating	17%	20% ■	18%	17%	14%
Top 2 Box (net)	53%	58%	56%	51%	49%

	White, Non-Hispanic n =3512	**Hispanic** n =688	**Black** n =479	**AAPI** n =322	**AI/AN** n =45	**Other** n =161
Very unmotivated	4%	2% ●	1% ●	1% ●	7% ■	4%
Somewhat unmotivated	5%	5%	4%	2% ●	2% ●	5%
Bottom 2 Box (net)	9%	7%	5% ●	2% ●	9%	9%
Neutral	42%	31% ●	35%	34%	40%	32%
Somewhat motivated	35%	38%	34%	46% ■	22% ●	34%
Very motivated	14%	24% ■	26% ■	18%	29% ■	25% ■
Top 2 Box (net)	49%	62%	60%	64% ■	51%	59%

	Sustainability Unconcerned/ Neutral n =3015	**Sustainability Conscious** n =2001	**Values Segment** n =488	**Convenience Segment** n =3470	**Health Segment** n =3429	**Quality Segment** n =1412
Very unmotivated	4% ■	2% ●	1% ●	3%	2% ●	2% ●
Somewhat unmotivated	6%	4%	3% ●	5%	5%	4% ●
Bottom 2 Box (net)	10%	6% ●	4% ●	8%	7%	6% ●
Neutral	45%	30% ●	19% ●	40%	33%	33%
Somewhat motivated	35%	38%	38%	36%	40%	37%
Very motivated	11% ●	25% ■	39% ■	16%	20% ■	24% ■
Top 2 Box (net)	45%	64% ■	77% ■	52%	60%	61%

■ = Over Index vs. Total (120 or Above)
● = Under Index vs. Total (80 or Below)

Preference of conditional messaging is evenly split across the three, though the Zero-Waste Lifestyle frame was taken more positively.

There's no strong consensus on the most motivating conditional frame out of the three, as shoppers are split across all—and their reasoning is unique for each. However, more consumers highlighted positive phrases in the Zero-Waste Lifestyle frame than in the other two.

> **"It directly talks about your family and how buying sustainable products can help them; it directly tells you examples of sustainable products you can buy; it directly implies how buying sustainable items can impact our world."**
>
> - Gen Z woman, Sustainability Neutral, prefers Eco-Friendly Products frame

> **"Because what you spend your money on impacts on our environment, and you don't realize it. Even the smallest purchases on plastic can have a huge difference on the environment so you would want to try to cut back on your spending."**
>
> - Gen Z man, Sustainability Neutral, prefers Eco-Friendly Products frame

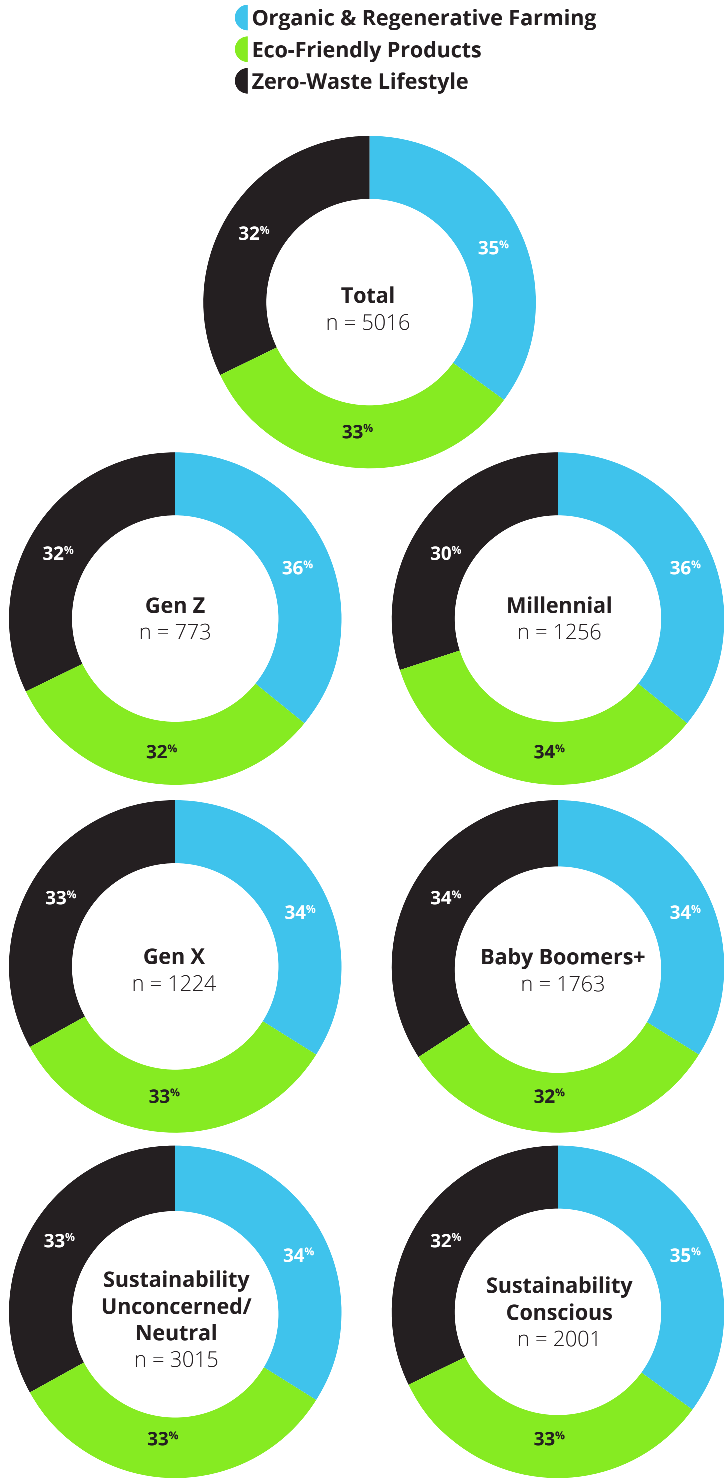
> **"This message reminds you of why organic items are beneficial to your health and the environment. Buying organic is something that everyone can do at any time."**
>
> - Gen X woman, Sustainability Conscious, prefers Organic & Regenerative Farming frame

> **"It was more detailed and actually told us something specific like reducing synthetic chemicals to improve soil health. A lot of other statements are very broad and also put more responsibility on the consumers when they talk about us using recycled stuff, etc. etc. Yes, we can do our part. But can YOU, as a company, do your part."**
>
> - Millennial man, Sustainability Neutral, prefers Organic & Regenerative Farming frame

> **"We waste so much food while other folks are starving. Plastic waste is a big problem. An area larger than the state of Texas is a floating plastic island in the Pacific Ocean. This plastic gets into the food chain. Yet I see everyday people not recycling. We need to get the word out!"**
>
> - Boomer man, Sustainability Conscious, prefers Zero-Waste Lifestyle frame

Conditional Message Preference

Of all the additions you saw, which one is most motivating for you to buy more sustainable items?



■ = Over Index vs. Total (120 or Above)

● = Under Index vs. Total (80 or Below)

Summary + Implications

What does it all mean?

Consumers liked messaging that shared the positive benefits of buying sustainable food, and, to some extent, easy actions they can take to adopt a more sustainable lifestyle. They did not like messaging that told them what to do explicitly: purchase from companies that commit to helping the environment, buy organic foods, switch to compostable products.

How can brands use this data?

Avoid messaging driven by guilt: Many consumers find guilt-based messaging unappealing. Brands should instead consider using uplifting messages that celebrate sustainable actions consumers already take.

Educate consumers with empowering language: Shoppers were most encouraged by language that was empowering and explained how sustainable choices benefit the planet. As earlier questions in the survey indicated there's room for knowledge growth about sustainability in general, brands have an opportunity to use uplifting language while deepening consumer education about what sustainability is and how it impacts our world.