

# What Sustainability Means to Consumers: Food & Beverage

A brand's guide to consumer attitudes, behaviors and expectations

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 Biodegradable



## Consumers are hungry for sustainability efforts from food & beverage brands — and opportunities are aplenty



From food waste to packaging to farming and factory emissions, there are numerous ways food & beverage companies can engage around sustainability initiatives. The nature of the packaged goods category, and the relationship between food and farming, means food & beverage sustainability is highly visible and, as such, highly important to consumers.

But there are many gaps to solve — only 19% of consumers have “a lot” of trust in the industry to do what’s right, and just over a quarter said they don’t know what makes a food or beverage product sustainable.

Companies have an opportunity to address these gaps with action and education. Making a commitment to reducing water and food waste tops the list of actions consumers want brands to take. A majority of Gen Z and millennial consumers research the sourcing and production practices of products they purchase. They expect brands to be walking the walk.

Sustainability is a complex topic. Many companies are engaging in innovative solutions, but there’s opportunity to tell consumers exactly what actions they’re taking and how those initiatives can help. This education, backed with concrete action, will help to build trust.

To help industry leaders navigate these important decisions, we measured consumers’ current knowledge, concerns and behaviors around sustainability to help inform how future sustainability efforts can best meet their expectations.

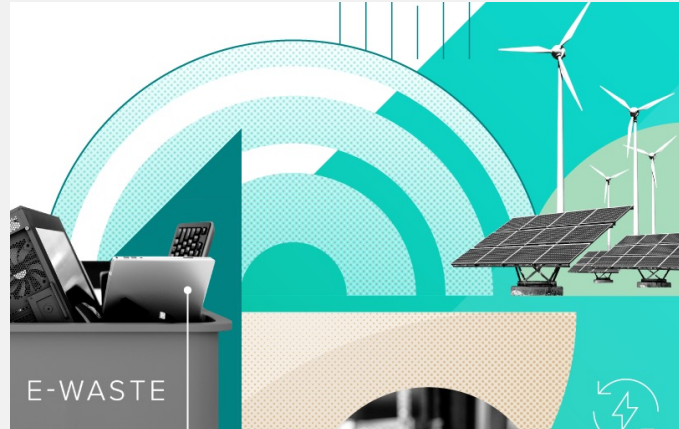
# Additional Reading



## Sustainability in the Retail & E-Commerce Industry

While consumerism is inherently not sustainable, retailers can mitigate impact by supporting the resale market, moving toward more recyclable packaging and more.

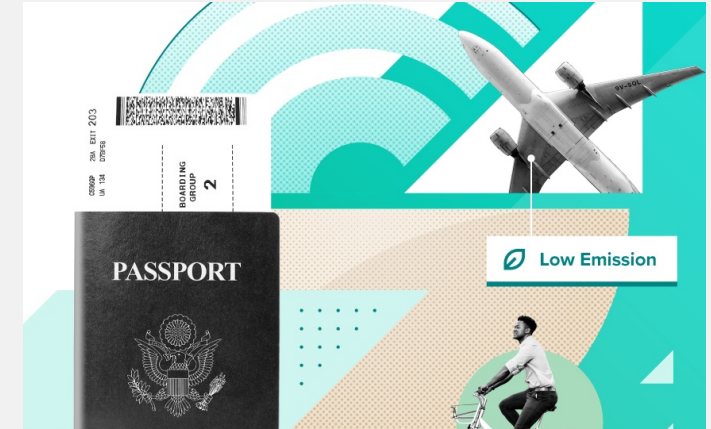
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## Sustainability in the Tech Industry

As innovators, tech companies shoulder huge responsibility for moving forward not only their own sustainability efforts, but other industries' as well.

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## Sustainability in the Travel & Hospitality Industry

Brands must go beyond marketing to help climate-concerned travelers overcome the gap between sustainable expectations and action.

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# Key Takeaways



## CONSUMER ATTITUDES

### Food, beverage and sustainability go hand in hand

Consumers named food & beverage one of the most important industries when it comes to sustainability. That ranking provides a lot of opportunity, and a lot of responsibility, given that sustainability is a complex topic for the industry. More than 1 in 4 U.S. adults said they don't know what makes a food or beverage product sustainable.



## CONSUMER BEHAVIORS

### Consumers already engage in several sustainable actions

Reducing food waste, recycling packaging and reusing grocery bags are common behaviors among all U.S. adults, with Gen Zers and millennials more likely to engage in a range of activities for the sake of sustainability. Younger consumers are also actively looking for companies to join them.



## BRAND ACTIONS

### Reduce, reuse, localize

With so many facets of sustainability to address, food & beverage brands should focus on the areas consumers say are most important for corporations to engage with: reducing water and food waste, using recyclable packaging, and offering locally sourced products.

## SECTION 1

# Consumer Attitudes

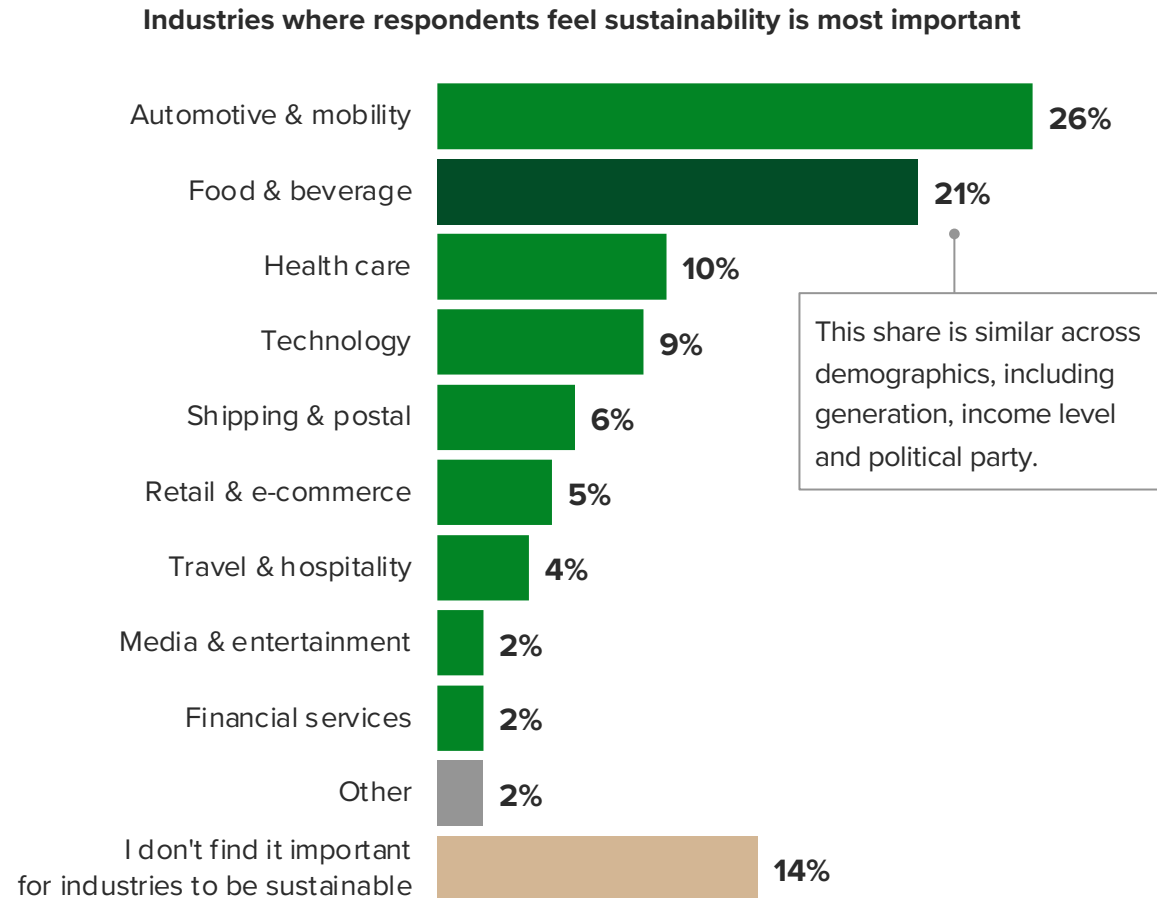
While sustainability in the food & beverage industry is important to consumers, it's a complex topic — around 1 in 4 adults can't articulate what makes products in the category sustainable







## Consumers see the importance of sustainability in food & beverage over other industries



The public has high expectations for food & beverage when it comes to sustainability.

The industry came in second only to automotive when consumers were asked to select the sector in which sustainability is most important. In an industry made up of frequently purchased, quickly consumed goods, the concept of sustainability is highly visible in terms of packaging and waste. And long before those packaged goods reach consumers' homes, this industry dictates how land across the world is used through industrial farming.

While a majority (60%) of U.S. adults have at least some trust in the industry to do what's right for the environment, only 19% have "a lot" of trust, suggesting there is quite a lot of room for improvement.

That improvement is worth the effort because **7 in 10 U.S. adults would consider purchasing from a food & beverage brand that prioritizes sustainability**, the highest share across industries.



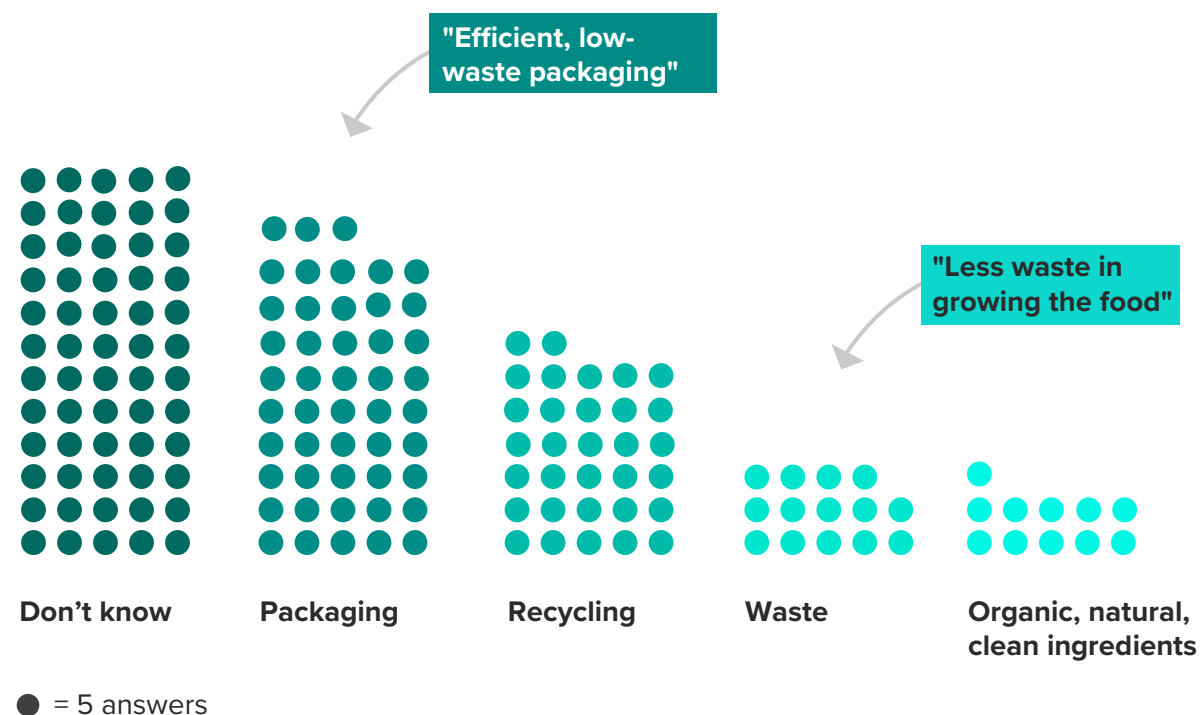
## Despite the relative importance of sustainability, at least 1 in 4 say they don't know what makes food & beverage products sustainable

It's quite a conundrum: Despite saying it's important for food & beverage companies to be sustainable, at least 1 in 4 consumers said they don't know what makes products in the food & beverage industry sustainable.

A general lack of knowledge around where our food comes from and how it gets to our tables contributes to this lack of awareness about sustainability. Most consumers in the United States are far removed from the origin and processing of the foods they eat. Thus, many people are not familiar enough with every step of the process to have an opinion on what companies can do to make more sustainable products.

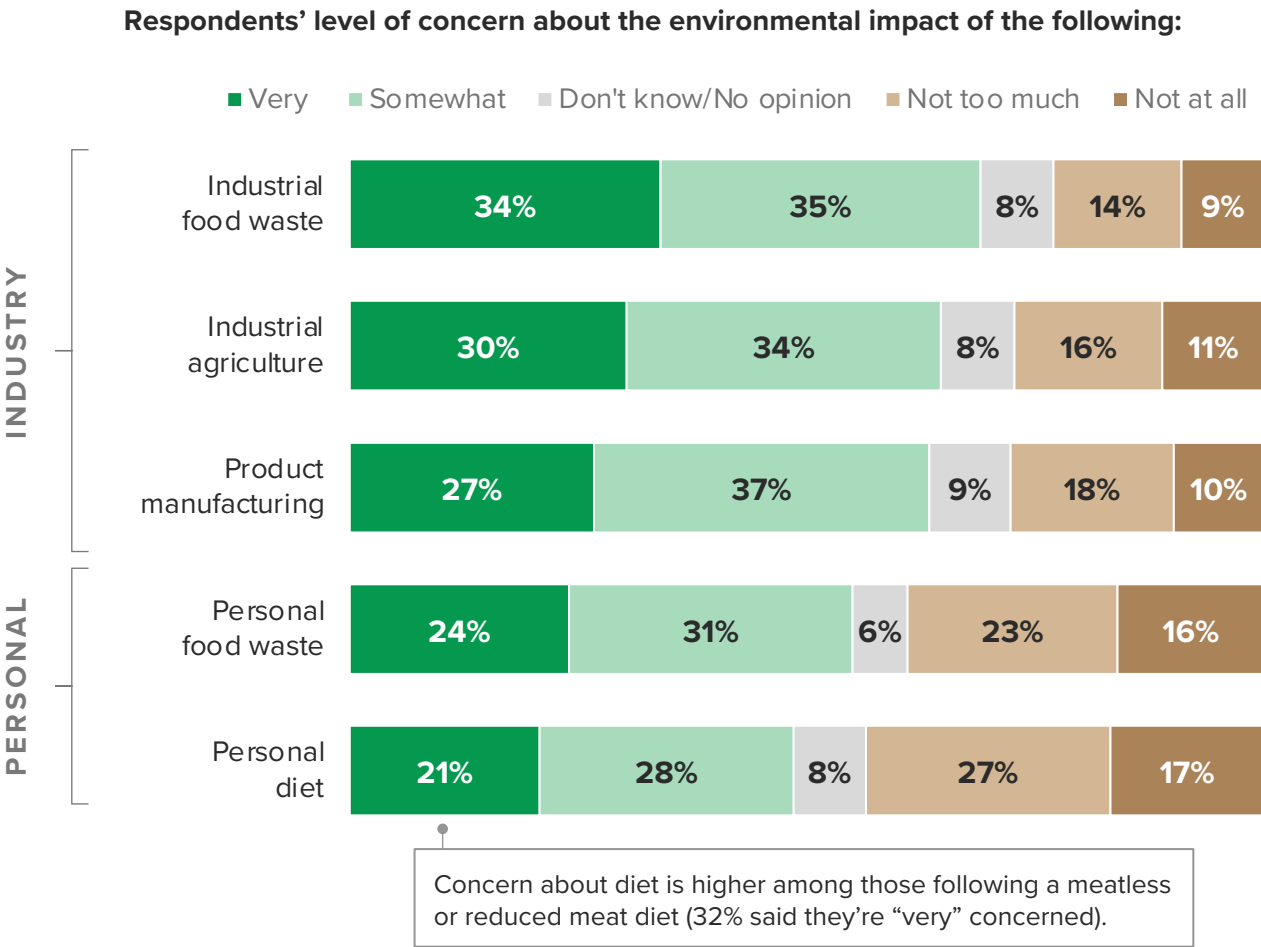
One thing people are familiar with is packaging, which was the next most common response from consumers when describing what it means for a food & beverage brand to be sustainable. Disposing of packaging in an environmentally friendly way or reducing packaging altogether were common refrains from consumers in this category.

Respondents were asked to describe in their own words what it means for a food & beverage brand to be sustainable. Below is a summary of common response categories





# Food & beverage brands’ environmental impact is more important to consumers than their own



When it comes to environmental impact, U.S. adults are more concerned about what companies are doing than what they themselves are doing. Food waste created by grocery stores, restaurants, and food and beverage manufacturers tops the list as most concerning.

Minimizing waste is a win-win for companies, as it not only addresses consumers’ concerns, but also helps control costs. Companies can benefit by finding ways to communicate and educate consumers around waste reduction efforts.

In contrast, consumers aren’t as concerned about their own behaviors, though roughly half say they are concerned about food waste in their household and the environmental impact of their overall diet.

Political party plays a big role in environmental concerns. Democrats are roughly 20 percentage points more likely to express concern across each of these factors than Republicans. These levels of concern factor into differing sustainability-related behaviors for these groups as well.

Source: Morning Consult Research Intelligence. Figures may not add up to 100% due to rounding.





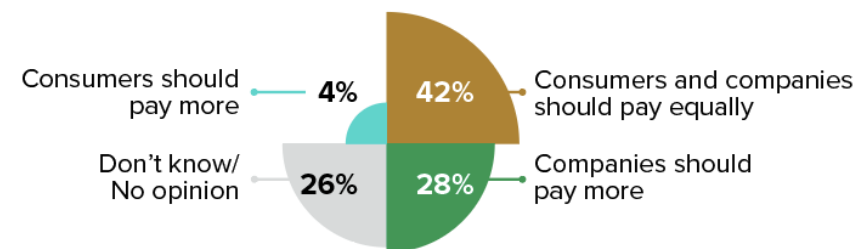
## But there's a willingness to share sustainability's costs and responsibilities with companies

Despite being more concerned about the impact of industrial practices than their personal habits, a plurality of consumers are willing to share the costs associated with sustainability.

U.S. adults were 14 points more likely to say costs should be shared than they were to say companies should pay more. Just over a quarter of respondents were undecided. Again, it's a complex topic with multiple facets that could make it difficult for consumers to come down on one side or the other.

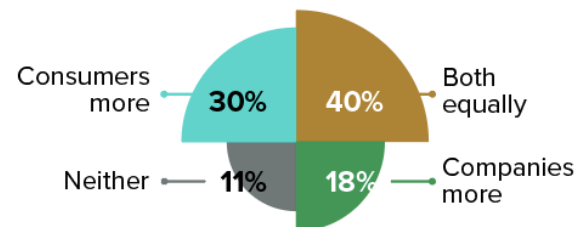
A similar pattern emerges in responsibility for minimizing food and beverage or packaging waste — the largest share believe responsibility for both should be shared. Responsibility to minimize packaging waste skews more toward companies, with around 7 in 10 saying it should be shared equally or the companies' responsibility. The inverse is true for minimizing food and beverage waste: 7 in 10 say it should be shared equally or consumers' responsibility.

Respondents were asked whether consumers or companies should take on more of the **cost** associated with sustainable goods and practices

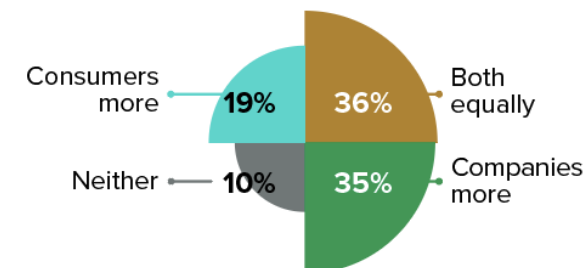


Respondents were asked whether consumers or companies should have more **responsibility** for...

### Minimizing food and beverage waste



### Minimizing waste from food and beverage packaging



Source: Morning Consult Research Intelligence. Figures may not add up to 100% due to rounding.

## SECTION 2

# Consumer Behaviors

Reducing food waste, recycling and reusing grocery bags are common actions. Gen Zers and millennials are leading the way, and they're looking for companies to join them





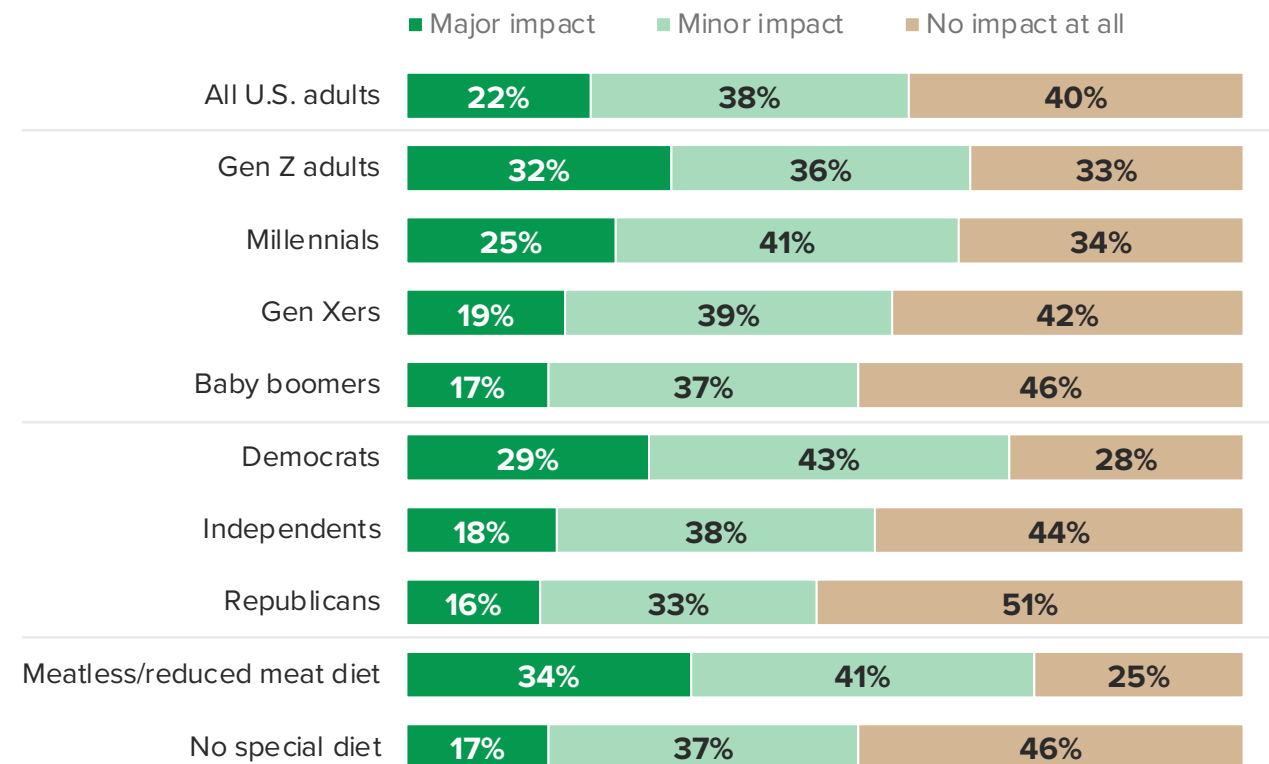
## Gen Zers, millennials and Democrats more likely to say climate change has an impact on their daily eating and drinking behaviors

People weigh dozens of factors in every food and drink decision they make, including taste, cost, health and wellness, satiety, and convenience, just to name a few. The impact of diet on climate change is one consideration among many. Still, roughly 1 in 5 consumers say it has a major impact on their everyday food and beverage behaviors.

For some consumer groups, climate change rises higher on their list of considerations. Gen Zers are nearly twice as likely as baby boomers to say it has a major impact. A similar pattern is true of Democrats and those committed to a meatless or reduced meat diet; for the latter, it may be a contributing factor to their decision to follow said diet.

Reaching these consumers is key for food & beverage companies, as these demographics are most likely to engage in sustainability-focused behaviors and with brands' sustainability initiatives.

### Impact of climate change on respondents' everyday eating and drinking behaviors

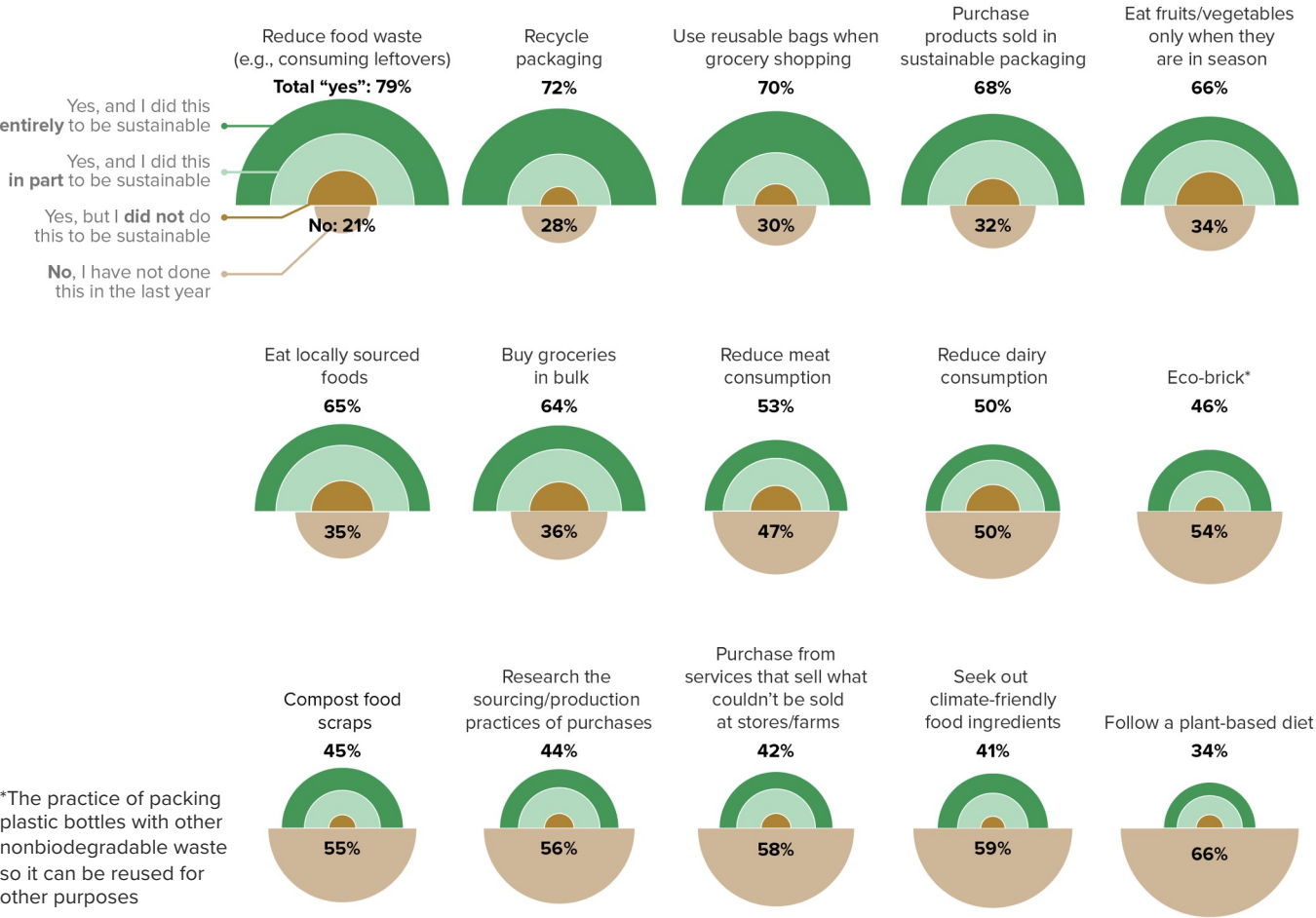


Source: Morning Consult Research Intelligence. Figures may not add up to 100% due to rounding.



# Consumers’ top sustainable behaviors have environmental and personal benefits

Respondents were asked if they have done any of the following in the last year, and why:



Nearly 8 in 10 consumers work to reduce their food waste, which is popular in part because it offers benefits beyond sustainability alone, including cost savings and fewer trips to the grocery store.

Recycling packaging and using reusable grocery bags, both common among consumers, are more focused on the aim of sustainability.

Majorities of consumers said they eat fruits and vegetables when they are in season, eat locally sourced foods, and buy groceries in bulk, but for each of these actions, a sizeable share (22% to 25%) said their aim was not to be sustainable. Understandably, these behaviors have myriad benefits.

On the third tier are behaviors that fewer than half of all U.S. adults engage in, but among those who do, sustainability is nearly always the goal.



# Gen Zers and millennials engage in sustainability-focused behaviors at higher rates

Respondents were asked if they have done any of the following in the last year, and why:



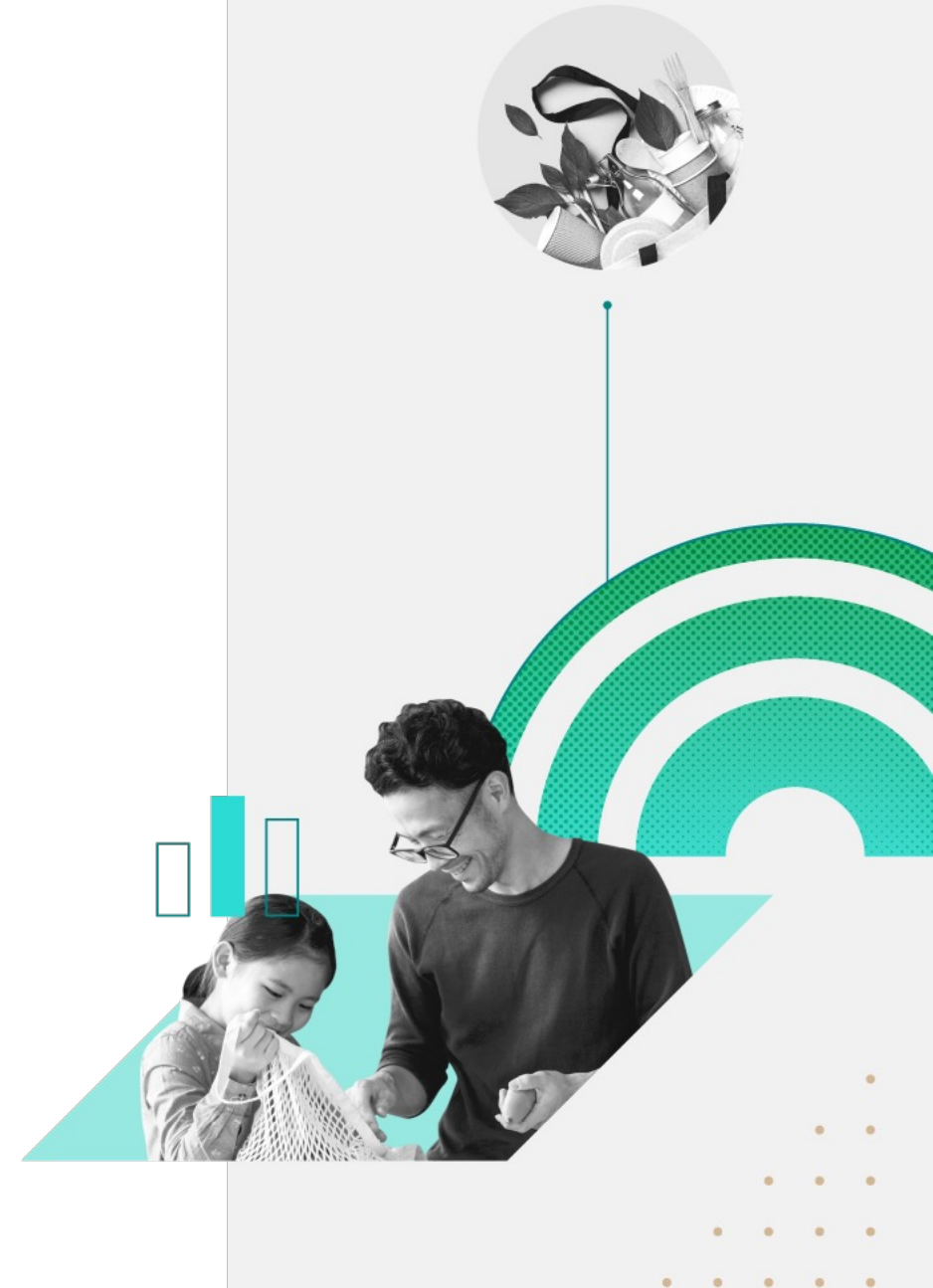
Gen Zers and millennials are walking the walk. As the generations most likely to indicate that climate change impacts their everyday eating and drinking behaviors, they are also much more likely to say they are engaging in a variety of core sustainability actions: composting, researching sourcing and production practices, and purchasing imperfect produce.

Brands should especially take note of the researching behavior, as these generations are looking for companies that will take action and walk hand in hand with them. Coming of age alongside the tangible impacts of climate change — from increased droughts and floods to wildfires and hurricanes — Gen Z consumers have established a pattern of behaviors that will last the rest of their lives.

## SECTION 3

# Brand Actions

Reducing water and food waste, using recyclable packaging, and offering locally sourced products top the list of sustainable actions consumers want to see from food & beverage companies





## Leveraging the Theory of Planned Behavior to predict sustainable actions

**It's tricky to predict consumer behavior, especially when it comes to sustainable attitudes.**

That's why we used the Theory of Planned Behavior, a psychological theory that links beliefs to behavior and is considered one of the most influential theories for understanding consumer behavior.

The theory explains that the more people intend to engage in a behavior, the more likely it will be that they actually enact the behavior. For example, the more one intends to recycle, the more likely it is that one will recycle. The theory explains that three factors predict these intentions:

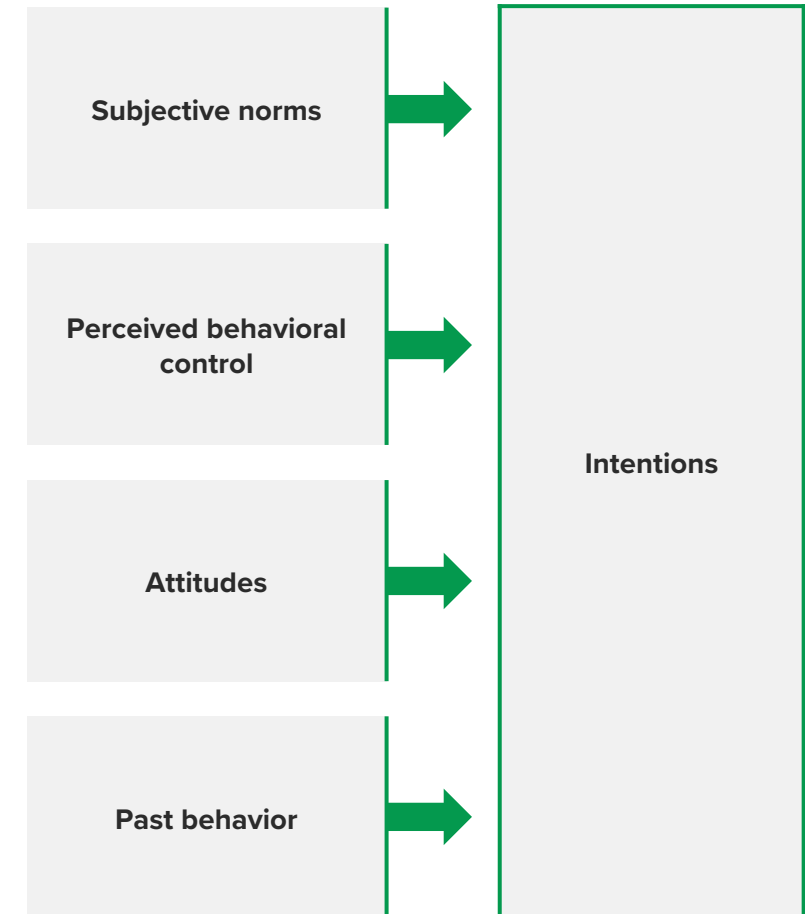
**Subjective norms** refer to one's perceived social pressure to engage in the behavior or not. The more social pressure they feel to engage or not engage in the behavior, the higher the subjective norms.

**Perceived behavioral control** refers to how easy or difficult people think it will be to engage in a specific behavior. The easier they think it would be to engage in the behavior, the higher their PBC.

**Attitudes** refer to how favorable or unfavorable one thinks the behavior will be. The more favorable evaluation they have of the behavior, the more positive their attitudes are toward the behavior.

**Past behavior** was included as an additional predictor given that it has been shown to have a unique role in intentions and behavior.

According to TPB, the more favorable the attitudes toward the behavior, the stronger the subjective norms to perform the behavior, and the greater the PBC over the behavior, the more likely people should be to intend to engage in that behavior.



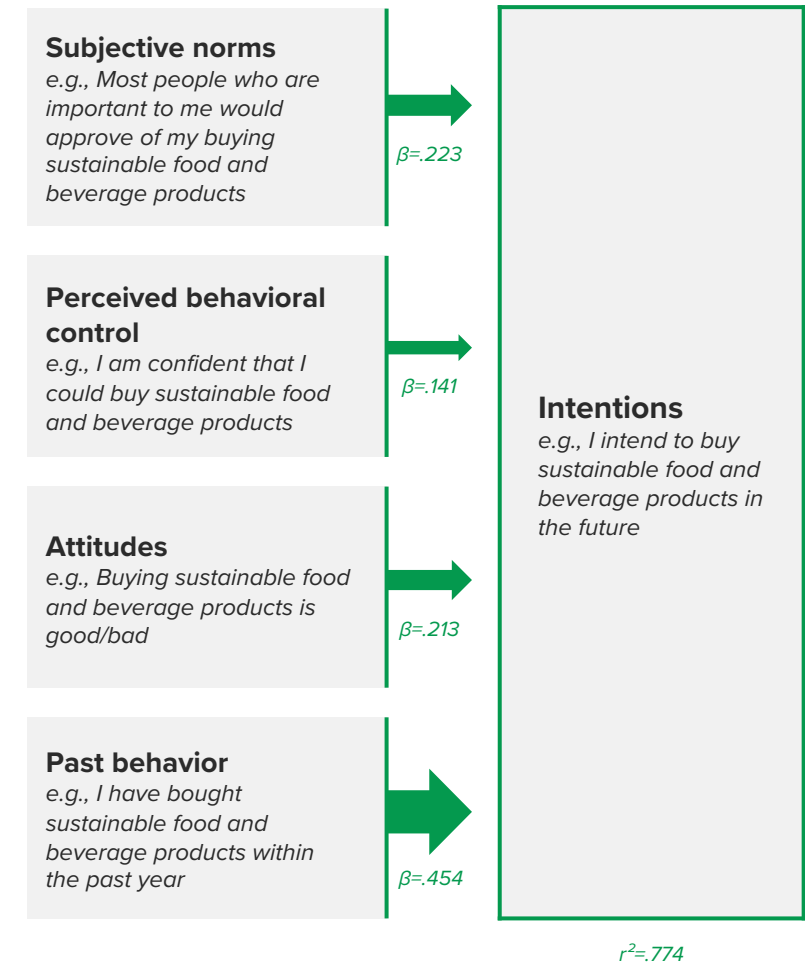
## Social approval and positive attitudes are key to driving future intent to purchase sustainable foods and beverages

We found that past behavior was the strongest predictor of intentions to buy sustainable food and beverage products in the future, as demonstrated by the highest *beta coefficient* ( $\beta=.454$ ). Thus, targeting current sustainability-focused buyers is a strong strategy for brands playing in this space.

To grow beyond current purchasers, brands can focus messages and brand positioning on subjective norms, another significant predictor of intentions. The stronger the perception of social pressures to buy sustainable food and beverage products, the stronger the intentions to purchase these products.

Attitudinal targeting is also nearly as effective: People who feel more positively about buying sustainable food and beverage products — that it's good, necessary and important — also tend to have stronger intentions to buy these products ( $\beta=.213$ ).

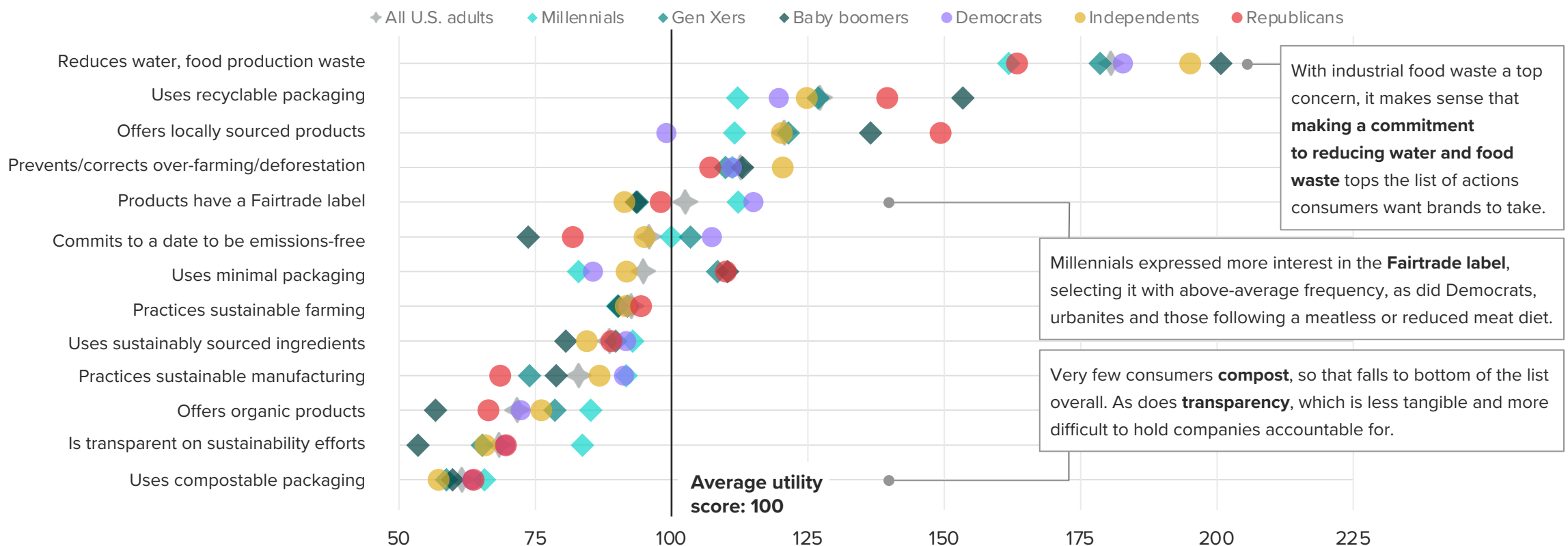
Perceived behavioral control, although still positively correlated and predictive, is the weakest of the indicators. In food & beverage, helping to remove perceived barriers to purchasing sustainable products is not the first area brands should address.



All beta coefficients are significant. The regression coefficient was estimated using a partial least squares regression (PLS).

## Consumers are looking for companies to address waste, use recyclable packaging and offer locally sourced products

Respondents rated the importance of several sustainable actions that food & beverage brands/companies can take. Charted below are the average utility scores, which indicate the relative importance of each action across respondents:



A score of 100 indicates that action has an average likelihood of being considered the most important to a given respondent. A score of 200 indicates the action is twice as likely as average, while a score of 50 indicates it is half as likely to be considered the most important.

Source: Morning Consult Research Intelligence

## Trust perceptions increase with ‘sustainably sourced’ label

In the realm of sustainability, there’s more to gain than a larger share of consumers’ wallets. Companies should also weigh intangible benefits like trust. Earning and keeping consumer trust is crucial to building long-standing relationships.

In a split-sample exercise, survey respondents saw either an image of a honey jar with a “sustainably sourced” claim on the label or an image without a claim. Trust in the brand that makes the product increased 9 points among the respondents who saw the honey with the “sustainably sourced” label.

The increase in trust came primarily from Gen Xers and baby boomers, who were 11 and 15 points more likely to express trust. In contrast, trust was flat among millennials, perhaps related to the group’s desire to do their own research on the products they buy.

Meanwhile, purchase interest was identical between the two images, despite the fact that respondents who saw the claim thought the product cost \$.45 more on average. This suggests consumers may be willing to pay a slight premium for a sustainably sourced product.

This trust halo helps to reinforce the idea that companies’ sustainability efforts supply a purpose-driven “why” — above and beyond a drive for profits — that resonates with consumers.

Respondents were shown one of two images and asked about their perceptions of cost, sustainability and trust, as well as purchase interest



# Brands need to close the gap between consumer concern and understanding of food & beverage sustainability

Food & beverage and sustainability are closely linked. Given consumers' daily interactions with products in the category, they are understandably concerned about the environmental impact of this large industry. The good news is that consumers are willing to share the responsibility for sustainability efforts — and maybe even the costs — with food & beverage companies.

A large majority of consumers are already regularly working to reduce their own food waste, recycle and reuse grocery bags. Gen Z adults and millennials have gone even further with their sustainability efforts. These younger consumers are adopting sustainable habits, like composting and buying imperfect produce, that will last their lifetimes.

But companies in this industry have work to do to meet consumers on this journey. More consumers expressed concern about the environmental impact of industry practices than their own habits. Reducing water and food waste in the production process, using recyclable packaging, and offering locally sourced products are the actions consumers are most interested in seeing companies pursue. Brands can focus their actions on these areas to address consumers' concerns and build trust.

Defining the target audience will also help further companies' sustainability initiatives. A majority of Gen Z adults and millennials are actively investing time and mental energy in learning about sustainability initiatives. Brands should determine their category-specific wants and needs to inform new product development and tailor communications to meet their information needs.

Brands should also consider the political party ID mix of their customers. There are differing concerns, sustainability behaviors and brand expectations among Democrats, independents and Republicans.

And when it comes time to set goals for sustainability initiatives, brands need to include metrics tied to intangible consumer sentiment like trust. Consumers' perceptions that companies are placing people and the planet over profits will influence more than just purchase consideration.

# About the Report & Methodology

The “What Sustainability Means to Consumers” project unpacks consumer attitudes and behaviors connected to sustainability, in addition to identifying what sustainable actions consumers expect from the brands they purchase from. Visit our [sustainability portal](#) to explore and download all the research in this project.

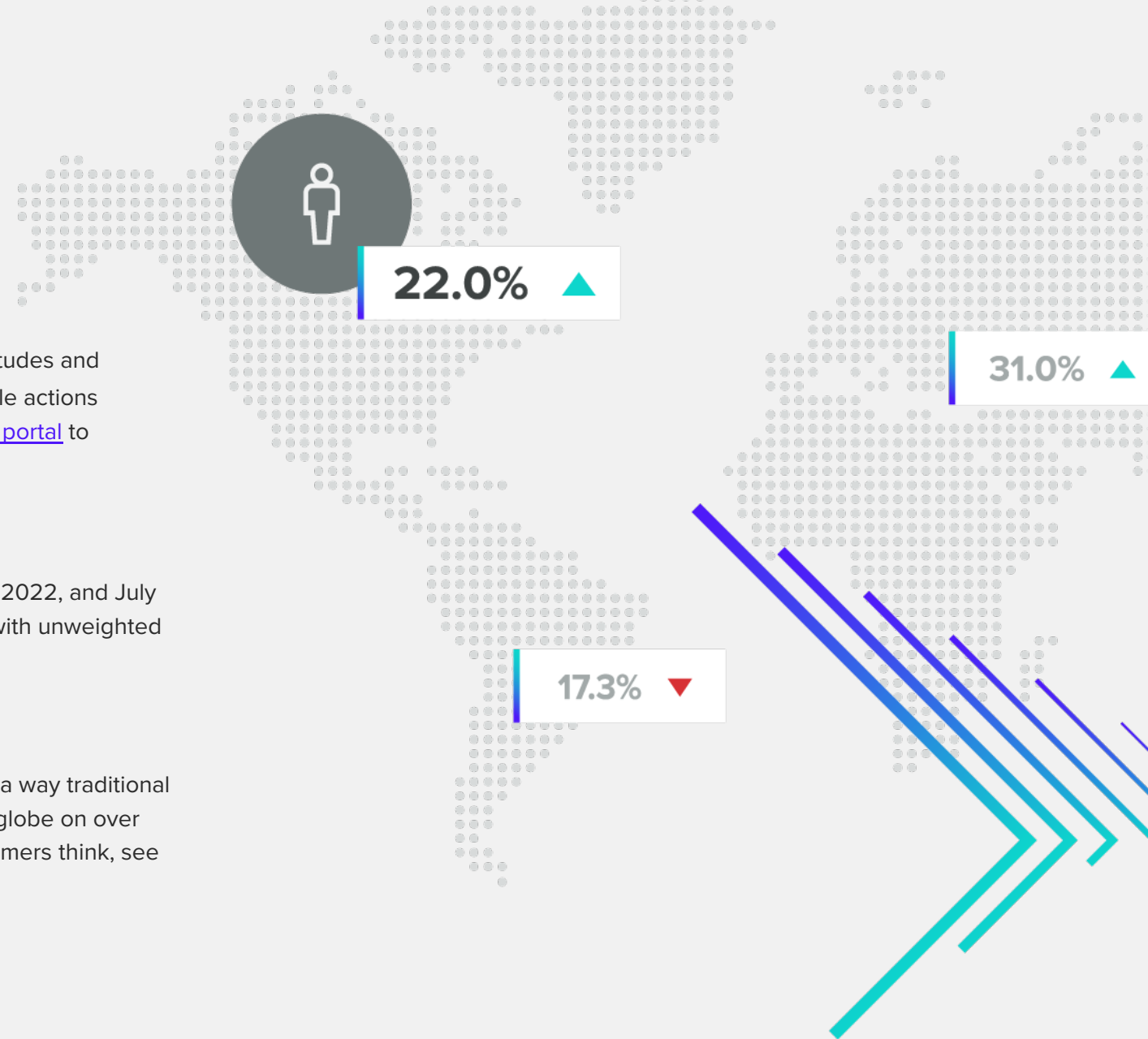
## Methodology

The analysis behind this report is drawn from two surveys fielded June 24-28, 2022, and July 5-7, 2022, among representative samples of roughly 2,200 U.S. adults each, with unweighted margins of error of +/-2 percentage points.

## Research Intelligence

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**EMILY MOQUIN**  
Food & Beverage Analyst

## ABOUT THE AUTHOR

**Emily Moquin is the food & beverage analyst at global intelligence company Morning Consult, where she leads efforts to deliver real-time insights for leaders in the sector.**

Emily analyzes consumer behavior, from dining out to grocery shopping to alcohol consumption. Her research helps food & beverage businesses make faster, better decisions.

Prior to joining Morning Consult, she worked at Gartner as a director analyst, covering consumers and food & beverage, as well as at H.J. Heinz, where she managed consumer and customer insights across multiple brands, including Heinz Ketchup, Weight Watchers Smart Ones and Bagel Bites.

Emily graduated from Pennsylvania State University with bachelor's degrees in advertising/public relations and political science.



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