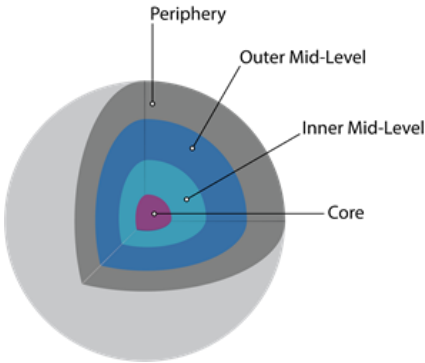


The World of Sustainability

Awareness of sustainability continues to grow. There is clear evidence that sustainability is becoming more prevalent in consumers' attitudes and lifestyles. The following depicts consumers' orientation within the World of Sustainability.

WORLD OF SUSTAINABILITY



In 2015, 88% of consumers are inside the World of Sustainability

Consumers' orientation in the World of Sustainability ranges from the most intensely involved (**the Core**) to those least involved (**the Periphery**).



Core. Is the smallest segment and most intensely involved in sustainability.



Mid-Level. Represents the majority of consumers and the greatest opportunity because of both their size and relatively high level of interest in sustainability.



Periphery. Consumers rarely consider sustainability explicitly in their decision making, but it does play a general role in their value system.

4 ZONES OF RESPONSIBILITY

Consumers view the World of Sustainability and its relationship to product categories through the lens of **four zones of responsibility**. These zones help to uncover consumers' priorities when purchasing, the impact sustainability has on their purchasing and their barriers to purchasing sustainable products.

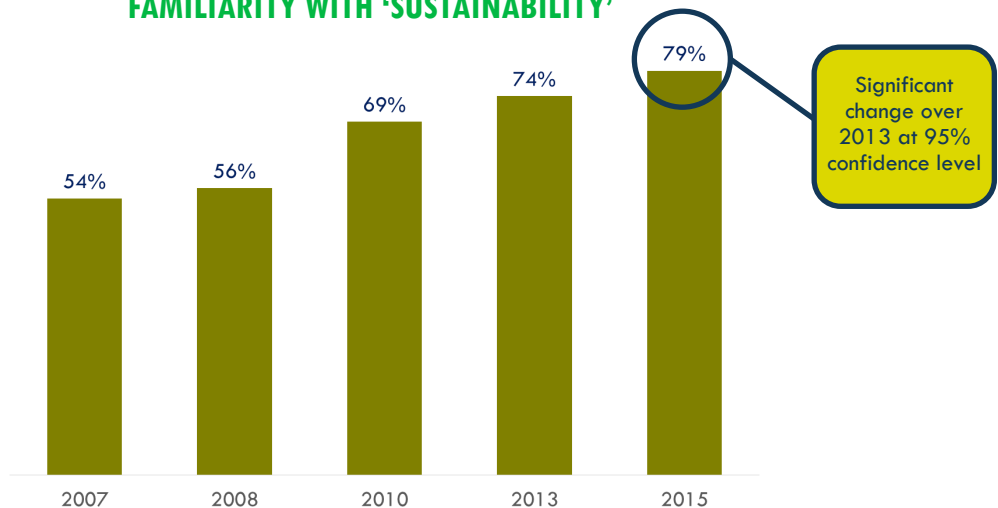


Looking through the lens of the zones provides a deeper understanding of which sustainability practices can have the greatest influence on purchases. The prioritization of consumers' purchasing criteria differs by product category:

FOOD & BEVERAGE	PERSONAL CARE PRODUCTS	HOUSEHOLD CLEANING PRODUCTS	PET FOOD	QUICK SERVICE & QUICK CASUAL RESTAURANTS
Supporting U.S. & Local Economy	Animal Welfare	Environmental Impact of Disposal	Animal Welfare	Employment Practices
Animal Welfare	Supporting U.S. Economy	Supporting U.S. Economy	Supporting U.S. Economy	Supporting U.S. & Local Economy
Employment Practices	Air & Water Pollution	Animal Welfare	Natural Agricultural Methods	Animal Welfare
Natural Agricultural Methods	Maintaining Natural Resources	Air & Water Pollution		
	Environmental Impact of Disposal			

FAMILIARITY WITH 'SUSTAINABILITY'

Familiarity with the term 'sustainability' has risen every year since 2007 and reached an all-time high in 2015



Source: Sustainability: Transparency 2015 report, The Hartman Group