



16th Annual LOHAS Sustainability in America

2017 NMI Consumer Trends
Tracker study



Since 2002, NMI's annual consumer research study devoted to social and environmental issues and the impact of sustainability initiatives on product purchase.

2017 Participation Opportunities



Capture Your Share of the \$1.5 Trillion U.S. Eco-Marketplace

| | 2005 (\$MM) | 2012 (\$MM) | 2020 (\$MM) |
|---|---------------------|---------------------|-----------------------|
| Alternative Energy | | | |
| Total Sales | \$ 607.2 | \$ 699.5 | \$ 819.5 |
| Alternative Transportation | | | |
| Total Sales | \$ 6,120.8 | \$ 185,044.8 | \$ 572,440.1 |
| Green Building | | | |
| Total Sales | \$ 35,400.7 | \$ 55,722.2 | \$ 116,684.4 |
| Natural Lifestyles | | | |
| Total Sales | \$ 5,393.8 | \$ 6,393.8 | \$ 8,913.4 |
| Organic Cotton/Natural Fiber & Textile | | | |
| Total Sales | \$ 4,018.4 | \$ 7,545.1 | \$ 8,755.6 |
| Personal Health | | | |
| Total Sales | \$ 25,140.0 | \$ 36,980.0 | \$ 47,148.2 |
| Ecotourism | | | |
| Total Sales | \$ 24,200.0 | \$ 144,200.0 | \$ 416,929.2 |
| Electronics/ Appliances | | | |
| Total Sales | \$ 39,902.0 | \$ 119,490.5 | \$ 161,647.5 |
| Consumer Packaged Goods | | | |
| Total Sales | \$ 57,271.0 | \$ 104,663.8 | \$ 191,086.8 |
| Grand Total | \$ 198,053.8 | \$ 660,739.7 | \$ 1,524,424.6 |

All Organizations Need Consumer Insight Into Sustainability To Respond Strategically

- Who the green/sustainability consumers are
- How do they interact in the marketplace
- What prices are they willing (or not) to pay for additional sustainability attributes
- What are the interactions between attitudes and behavior patterns
- What product benefits and attributes are driving their behavior
- What are the opportunities for further growth
- Where do consumers go for green information
- Where do consumers “acquire” green products
- What are the barriers to a sustainable lifestyle
- What, where, and how communication and messaging will resonate



NMI's Proprietary Sustainability Consumer Trends Database®

Sustainability

Covers 15 market sectors

- CPG
- Green Building
- Transportation
- Electronics
- Investing
- Energy
- Travel
- Apparel
- Pet Care
- Others

- 200+ LOHAS-related attitudes, drivers to consumer behavior
- Usage patterns across industries, product categories and brands
- Behavior/demos related to green activities, including memberships and non-profit donations
- Information sources

Since 2002

- The **first and only** consumer insight tool to measure and trend the sustainability marketplace for 15 years
- Quantifies the **size of the consumer market** for environmentally and socially responsible products/services
- Measures the **importance of environment and societal issues as well as corporate social responsibility**
- Explores **environmentally conscious behavior**
- **Annual tracking study** in U.S. since 2002 and globally since 2005
- **Online** methodology
- **3,000+ U.S. adults**, nationally projectable to the U.S. adult population and accurate at 95% confidence level to +/- 1.4%
- **100,000+ total global adults**

NMI's Proprietary Sustainability Segmentation Quantifies What Attracts People to Sustainability



LOHAS®
22%

- Active stewards
- Personal and planetary health
- Heaviest purchasers
- Early adopters & influencers



NATURALITES®
21%

- Personal health > planetary health
- Secondary target for natural/ green
- Income restricts some behavior



DRIFTERS®
24%

- Green followers
- New to green
- Want to be seen as doing their part
- In search of easy green changes



CONVENTIONALS®
18%

- Practical & rational
- Driven by cost savings; eco-benefits secondary



UNCONCERNEDS®
15%

- Unconcerned about the environment and society
- Dealing with day-to-day challenges

The “State of the Sustainability”

- Many consumers feel a strong connection between personal and planetary health, and they see this link everyday from the foods they eat to the cars they drive.
- Consumers incorporate eco-focused behaviors in their lives in many different ways, at varying levels and for different reasons. While not all consumers hold ‘deep green’ inclinations, marketers can appeal to a consumer groups’ specific motivations.
- Millennials are driving the growth of many green products and are more likely to buy from companies whose values are like their own. They have the potential to fundamentally change the shape of sustainability as we know it today.
- Despite years of talking “green,” corporations still lag consumer expectations for taking environmental responsibility.

Trends to Explore in 2017: What You Could Capitalize On

- **Many consumers are underdeveloped in many product categories and market sectors**
 - What opportunities can you capitalize on?
- **Rise in the social side of sustainability**
 - What can your brand/company offer?
- **Households with Kids are showing increased eco-involvement**
 - How can you attract and retain these appealing demographics...for a lifetime?
- **Green product benefits are growing, but conventional attributes remain the most important**
 - It's important to understand the relative role of conventional vs. green attributes and develop the optimal balance in your marketing strategies

U.S. Sustainability Sponsorship Research Timetable

- Sponsorship Deadline: **May 15, 2017**
- Proprietary Questions Due: **May 2017**
- Survey in the Field: **June & July 2017**
- Proprietary Data Available: **Sept. thru Dec. 2017**



The 2017 U.S. Sustainability Consumer Trends Database Sponsorship Package Deliverables

- **Proprietary/custom survey questions**
- **Custom analysis and report**
- **Executive presentation and consulting session**
- **Custom data tables:**
 - Across all sponsor-proprietary and core questions
 - Including general population, the 5 NMI segments, and 10 custom banner points of sponsor's choice
- **U.S. Sustainability general report**
- **Costs are based on specific deliverables**



2017 Sustainability in America

16th Annual Consumer Research Study



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