Imagine Better
Our mission is to make sustainability* so desirable it becomes normal

*By sustainability, we mean brand purpose, social and environmental responsibility, citizenship, meaningful brands and any and all efforts to change the world for the better.
A GUIDE TO PRODUCT TRANSPARENCY FOR SUSTAINABILITY, ETHICS AND HEALTH
Consumers are most interested in transparency about the products they buy.

I am most interested in hearing about the sustainability impacts of the products I buy.

Source: CGF/Futerra expert survey, July 2018. Respondents: Corporate experts from 70+ companies in 26 countries.

Source: CGF/Futerra consumer research, October 2018. Respondents: 3,621 consumers in 7 countries.
Consumers are very satisfied or quite satisfied with product transparency on sustainability. (86% Corporate Experts)

Products provide the right amount of information on sustainability. (41% Consumers)

Source: CGF/Futerra expert survey, July 2018. Respondents: Corporate experts from 70+ companies in 26 countries.

Source: CGF/Futerra consumer research, October 2018. Respondents: 3,621 consumers in 7 countries.
Are you honest?
Are brands honest?

Perception that brands are **never honest**, or **not honest enough**, about:

- How their factory workers are treated
- How environmentally-friendly their products are
- How healthy their products are
- How safe their products are

Source: Futerra consumer research, June 2019. Respondents: 615 consumers in US.
Are brands honest?

Perception that brands are **never honest**, or **not honest enough**, about:

- **How their factory workers are treated**: 57%
- **How environmentally-friendly their products are**: 66%
- **How healthy their products are**: 62%
- **How safe their products are**: 55%

Source: Futerra consumer research, June 2019. Respondents: 615 consumers in US.
Are brands honest?

Perception that brands are **never honest**, or **not honest enough**, about:

- **How their factory workers are treated**: 57% (Millenials) vs. 83% (Gen Z)
- **How environmentally-friendly their products are**: 66% (Millenials) vs. 82% (Gen Z)
- **How healthy their products are**: 62% (Millenials) vs. 80% (Gen Z)
- **How safe their products are**: 55% (Millenials) vs. 72% (Gen Z)

Source: Futerra consumer research, June 2019. Respondents: 615 consumers in US.
Are brands honest?

Perception that brands are never honest, or not honest enough, about:

- How their factory workers are treated
  - Millennials: 69%
  - Gen Z: 84%
- How environmentally-friendly their products are
  - Millennials: 66%
  - Gen Z: 79%
- How healthy their products are
  - Millennials: 60%
  - Gen Z: 75%
- How safe their products are
  - Millennials: 56%
  - Gen Z: 67%

Do you think brands have a responsibility to make positive change in the world.

Are you satisfied with the positive change brands are currently making in the world?

Are you satisfied with the positive change brands are currently making in the world?

Which type of brands do you think are most honest?


- **Small business brands**
  - Millennials: 30% Small, 70% Familiar
  - Gen Z: 11% Small, 89% Familiar

- **Familiar, household name brands**
  - Millennials: 58% Small, 42% Familiar
  - Gen Z: 66% Small, 34% Familiar

**USA**
- Millennials: 70% Familiar, 30% Small
- Gen Z: 89% Familiar, 11% Small

**UK**
- Millennials: 58% Familiar, 42% Small
- Gen Z: 66% Familiar, 34% Small

**India**
- Millennials: 42% Familiar, 58% Small
- Gen Z: 11% Familiar, 89% Small

**South Africa**
- Millennials: 30% Familiar, 70% Small
- Gen Z: 34% Familiar, 66% Small
Which type of brands do you think are most honest?


<table>
<thead>
<tr>
<th>Country</th>
<th>Small business brands</th>
<th>Familiar, household name brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>UK</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
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<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>South Africa</td>
<td>34%</td>
<td>66%</td>
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</tbody>
</table>

USA: 35% Small business brands, 65% Familiar, household name brands
UK: 52% Small business brands, 48% Familiar, household name brands
India: 19% Small business brands, 81% Familiar, household name brands
South Africa: 39% Small business brands, 61% Familiar, household name brands

What you would do if you discovered a product was NOT honest?

If a product was NOT honest about a social, environmental, health or safety issue, would you be most likely to:

- **Not buy it**: 14%, 18%
- **Choose an honest alternative**: 41%, 44%
- **Hold off buying and do more research**: 21%, 24%
- **Buy it, but get in touch with the company**: 15%, 6%
- **Buy it anyway**: 10%, 8%

**Source:** Futerra consumer research, June 2019. Respondents: 2,171 consumers in UK, US, South Africa and India.
Please rank products based on how honest they are about social, environmental, health and safety issues.

This data shows the % of each generation who choose to rank an industry as MOST honest.

Baby/Personal Care: 25%
Food: 27%
Phones & Tech: 13%
Household Cleaning: 12%
Beauty & Cosmetics: 10%
Clothes & Fashion: 12%

Please rank products based on how honest they are about social, environmental, health and safety issues

This data shows the % of each generation who choose to rank an industry as MOST honest.

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How much do you care about honesty?

Percentage of people ranking 7 or above on a scale of 1 (care the least) to 10 (care the most).

- **Millennials:** 89%
- **GenZ:** 89%

How much do you care, and how much do you think brands care, about honesty?

Percentage of people ranking 7 or above on a scale of 1 (care the least) to 10 (care the most).

What’s going on?
The Honest Generation

Millennials drove brands to be **purposeful**, but Gen Z are demanding **proof**.

This generation were raised to question fake news, be suspicious of secrecy and hold sincerity as sacred.

They are the **Honest Generation** and they don’t expect brands to be perfect, but they do **expect them to be truthful**.
How do we reach this Honest Gen?
Transparent Pricing

We believe customers have the right to know what their products cost to make.

- Materials: $42.77
- Hardware: $6.10
- Labor: $24.75
- Duties: $12.55
- Transport: $14.00

**TRUE COST:** $100

$150
- EVERLANE

$500
- TRADITIONAL RETAIL

12 G. PROTEIN BAR
BARRE PROTÉINÉE

3 Egg Whites
14 Peanuts
2 Dates
No B.S.

Peanut Butter Chocolate
Beurre d’arachide chocolat

52g (1.83oz)
We trace it, so you can trust it... Thanks to DNA tracing technology, we can trace all our beef right back to every farm and every animal. And because we only work with farmers who share our high standards, respect for the environment and the food they produce, you know you’ll always enjoy responsibly reared, exceptional quality meat. Click on the map or pick a country and county from the list below and you’ll see how many beef farms we have in that region.

To find out more about one of our farmers, just click on a cow!
Being honest, even about problems, increases trust

How would it affect your trust of a brand if they were honest about a current issue they have with a product, such as the impact on the environment or the way their factory workers are treated?

Trust more: 49% of Millennials, 45% of Gen Z
Trust the same: 40% of Millennials, 42% of Gen Z
Trust less: 11% of Millennials, 13% of Gen Z

WE'RE SORRY

A chicken restaurant without any chicken. It's not ideal. Huge apologies to our customers, especially those who travelled out of their way to find we were closed. And endless thanks to our KFC team members and our franchise partners for working tirelessly to improve the situation. It's been a hell of a week, but we're making progress, and every day more and more fresh chicken is being delivered to our restaurants. Thank you for bearing with us.

Visit kfc.co.uk/braised-the-road for details about your local restaurant.

SORRY, NO CARNITAS.

Due to supply constraints, we are currently unable to serve our Responsibly Raised® pork.

Trust us, we’re just as disappointed as you, and as soon as we get it back we’ll let the world know.

For more information visit: chipotle.com/porkinfo
The Honest Generation is here. Are you ready?