

**KANTAR**



**S U S T A I N A B L E  
T R A N S F O R M A T I O N**

**FROM AMBITION INTO BRAND ACTION**

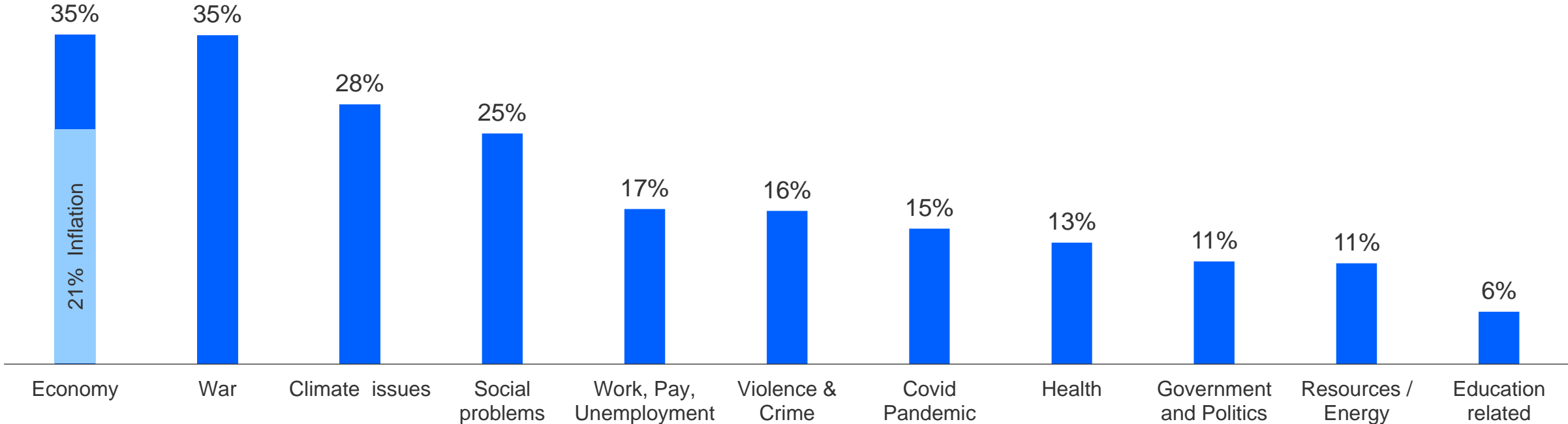
**Lela Charavgi**  
**Head of Business Development & Marketing**

An aerial photograph of a lush green forest. A winding river flows through the center of the image. A white rectangular frame is superimposed over the forest, enclosing the central text. The text is centered within the frame.

**How to address  
sustainability in an era of  
disruption**

# Kantar's Global Issues Barometer highlights the set of disruptions people are worried about and believe need to be tackled. Sustainability remains a top priority, led by climate change

% People mentioning big issues that need to be solved



# It's getting personal and people recognise their own role in this

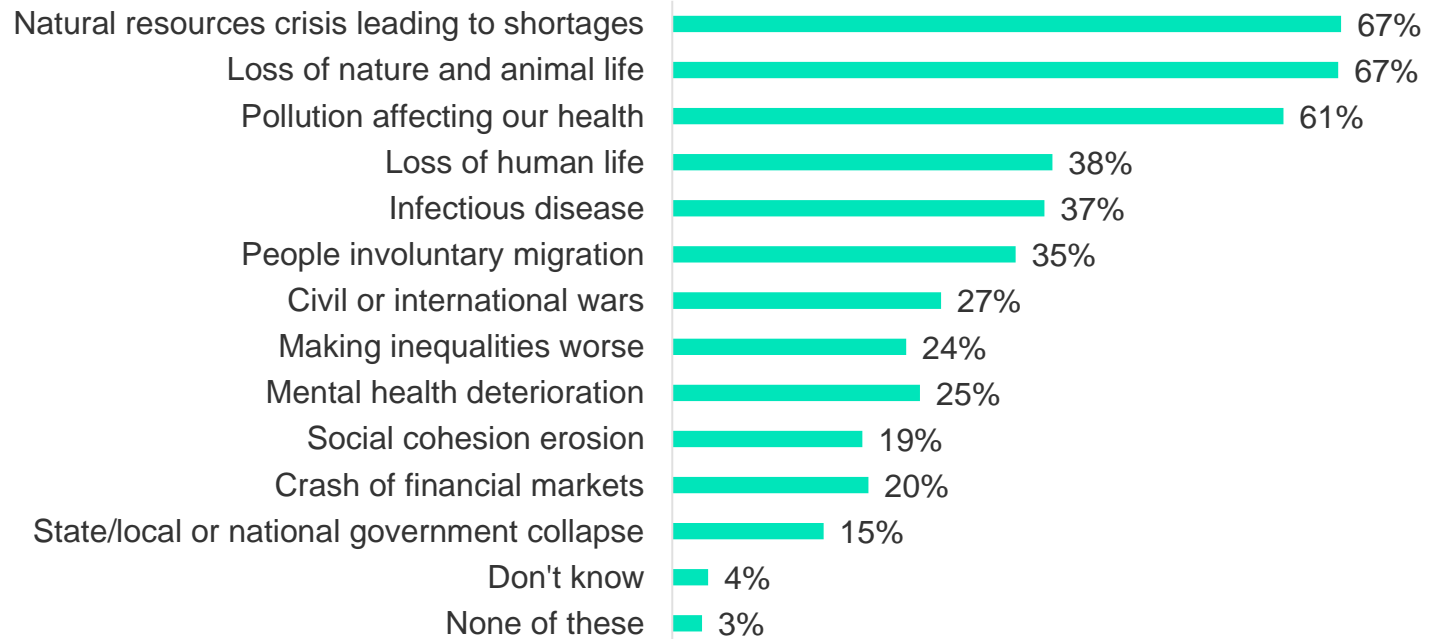
## Strong determination to act



71%

People like me need to do whatever we can to fight climate change

## What do you see as key potential consequences of climate change?



# People's sustainability concerns are rooted in what impacts their daily lives

Issues impacting...

## THE WORLD

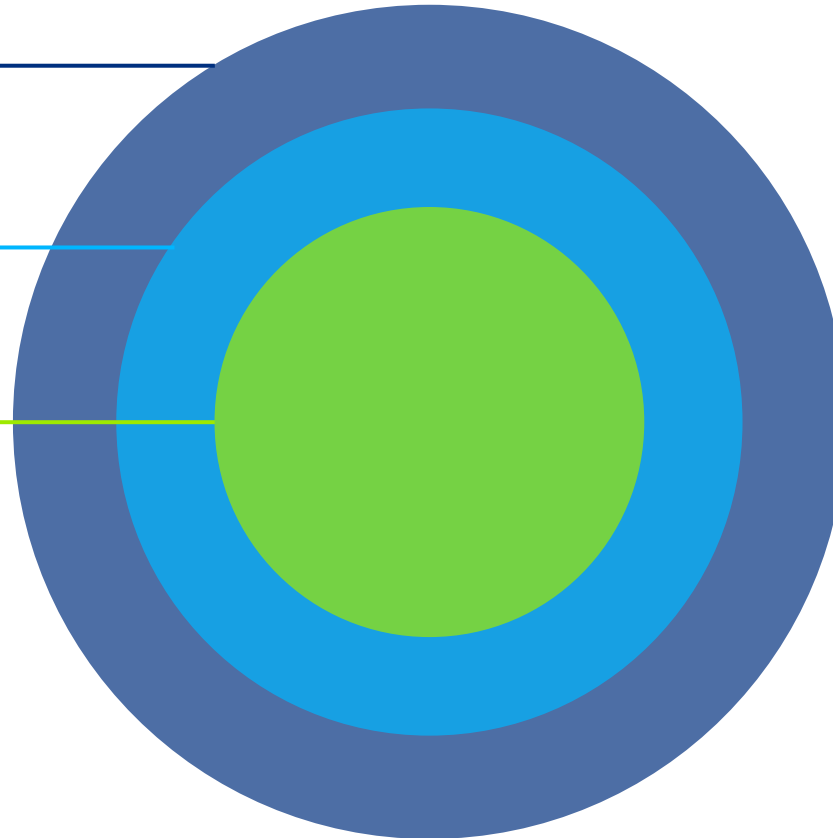
Concerned about issues that impact *the broader world*.

## MY WORLD

Concern for issues that impact *my life*.

## ME

Concerned about issues that impact *me personally*.



**1** Experience of environmental issues and structural social inequalities is increasingly real and raw.

**2** Global issues become most relevant when framed in local context.

**3** Less notion of abstract 'sustainability', more focus on specifics.

# A large majority want to consume better and are paying attention to what brands are doing

When purchasing a product...

**86%**

...take careful note or sometimes consider the causes brands support when making purchase decisions



## Sustainability and sustainable issues are important to consumers in Greece

**54%** Feel they can make a difference through the choices they make

**53%** pay lot of attention to environmental and societal issues in the news

**40%** believe buying sustainable products is a demonstration of who they are



When purchasing a product...

86%

...take careful note or sometimes consider the causes brands support when making purchase decisions



**BUT, sustainable products come at a premium and get in the way of mass adoption**



67%

believe that products that are better for the environment and society are more expensive



68%

want to do more to be more mindful of the planet and the environment, but their increased cost of living prevents them from doing so



**To realise the mainstream opportunity,  
brands must go to market at a price point  
the mass market can afford**

On Global level ...

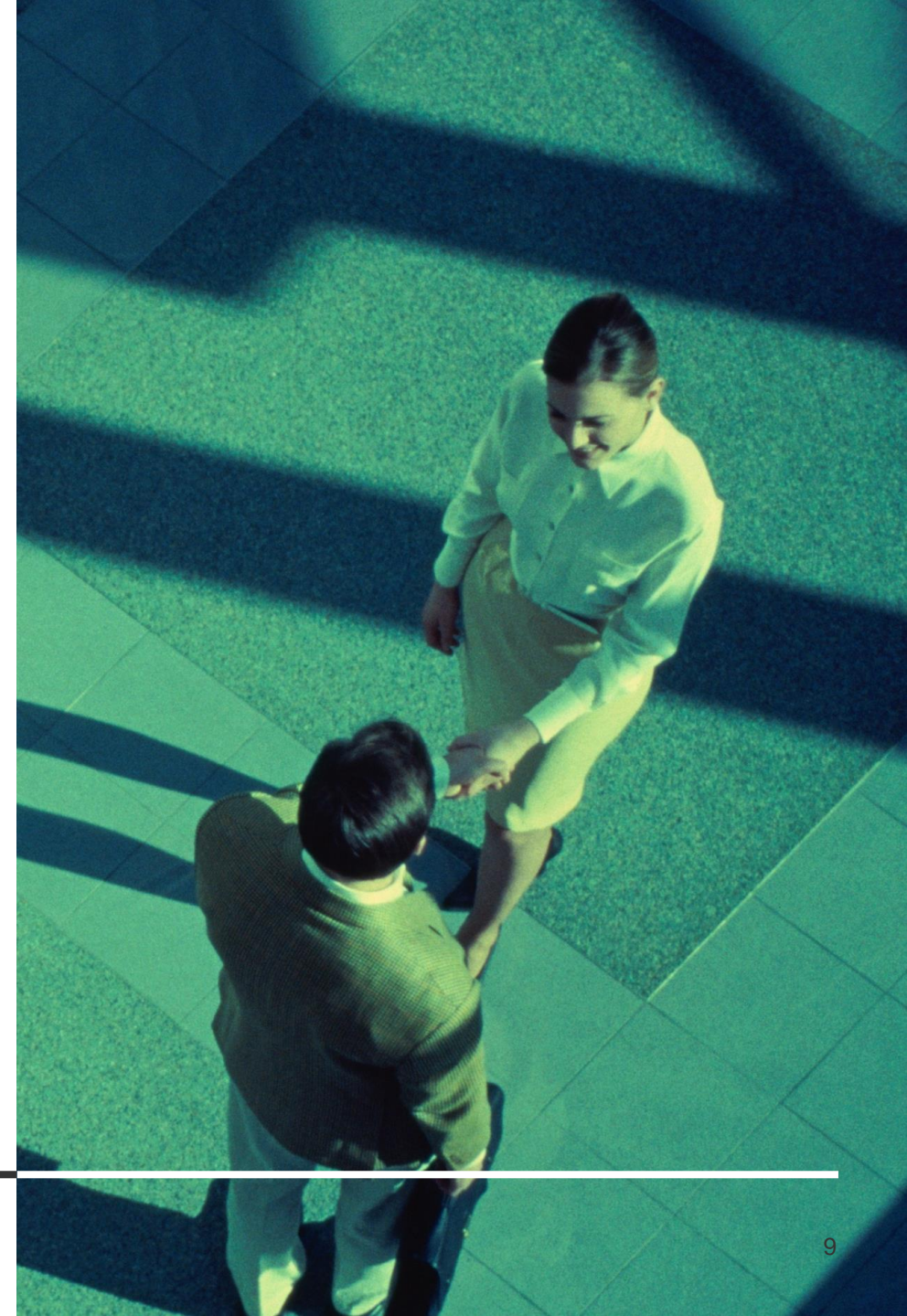
**75%**

want to buy  
environmentally  
sustainable products,  
but brands will have to  
make sure I can still  
afford to do that

**Latest IPCC Report is a stark warning of the cost  
of inaction on the climate**

MARCH 2, 2022  
Home » Latest IPCC Report is a stark warning of the cost of inaction on the climate

“The cost of action in the form  
of adaptation and mitigation  
measures is far less than the  
cost incurred by delays and  
inaction, which will result in  
further loss and damages  
caused by climate change.”  
**IPCC report 2022**



# Furthermore, trust in companies about their sustainable claims is limited

In Greece...

**65%** worry brands are involved in social issues just for commercial reasons

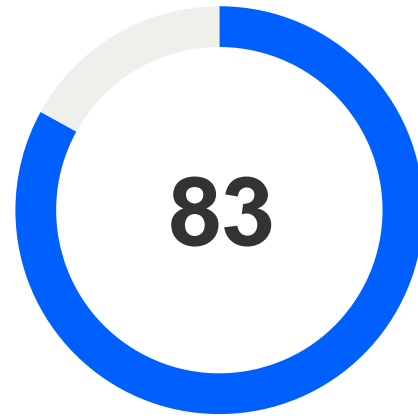
Only...

**11%** Claimed to have **never** seen or heard false or misleading information about sustainable actions taken by companies.

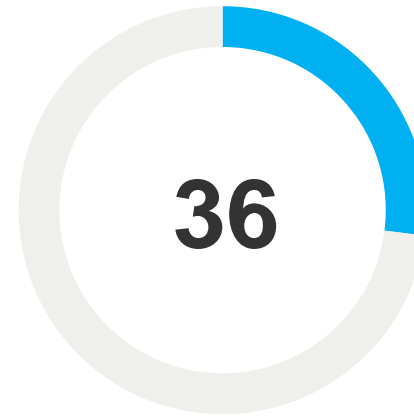


**Simply talking about sustainability does not equal success.  
Your sustainability message should be true to your brand.**

**Brand Demand  
Power Contribution**



**With Sustainability message  
AND fits with brand**



**With Sustainability message  
but weak fit with brand**

# People are eager to find solutions, opening new opportunities for brands to connect with their audiences

## Fossil fuels already peaked, growth in renewables exponential

The Rocky Mountain Institute said global demand for fossil fuels peaked in 2019, and renewables are occupying that demand due to low costs and shifts in global capital.

JANUARY 16, 2023 RYAN KENNEDY

SUSTAINABILITY UNITED STATES WORLD



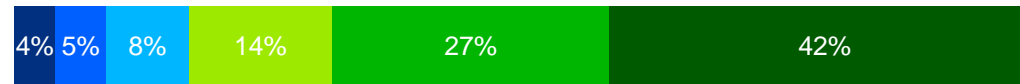
## Energy crisis shows clear imperative to shift away from oil and gas - Sturgeon

Scottish Government announces its draft Energy Strategy and Just Transition Plan

By Rebecca McCurdy & Peter A Walker Content Editor  
07:30, 10 JAN 2023



We should **stop worrying about fossil fuels** and reach agreement with anyone who can sell these to us



We should **move faster on renewable energy sources**



## Four consecutive years of 100% renewable energy—and what's next

April 21, 2021



# A joint journey is needed

## ACCESSIBILITY



42%

Don't know where to find sustainable/ethical products

## AWARENESS/ AVAILABILITY



Only 20%

Can confidently assert that the brands they like offer ethical/sustainable versions of their products

## LACK OF CLARITY



57%

Feel that it is really hard to tell which products are good or bad ethically, or for the environment

## FINANCE



57%

Say 'When shopping, my mind is on saving money more than saving the planet'

## CONVENIENCE



40%

Say 'I am in such a rush when shopping that I don't think about it'

## HABITS



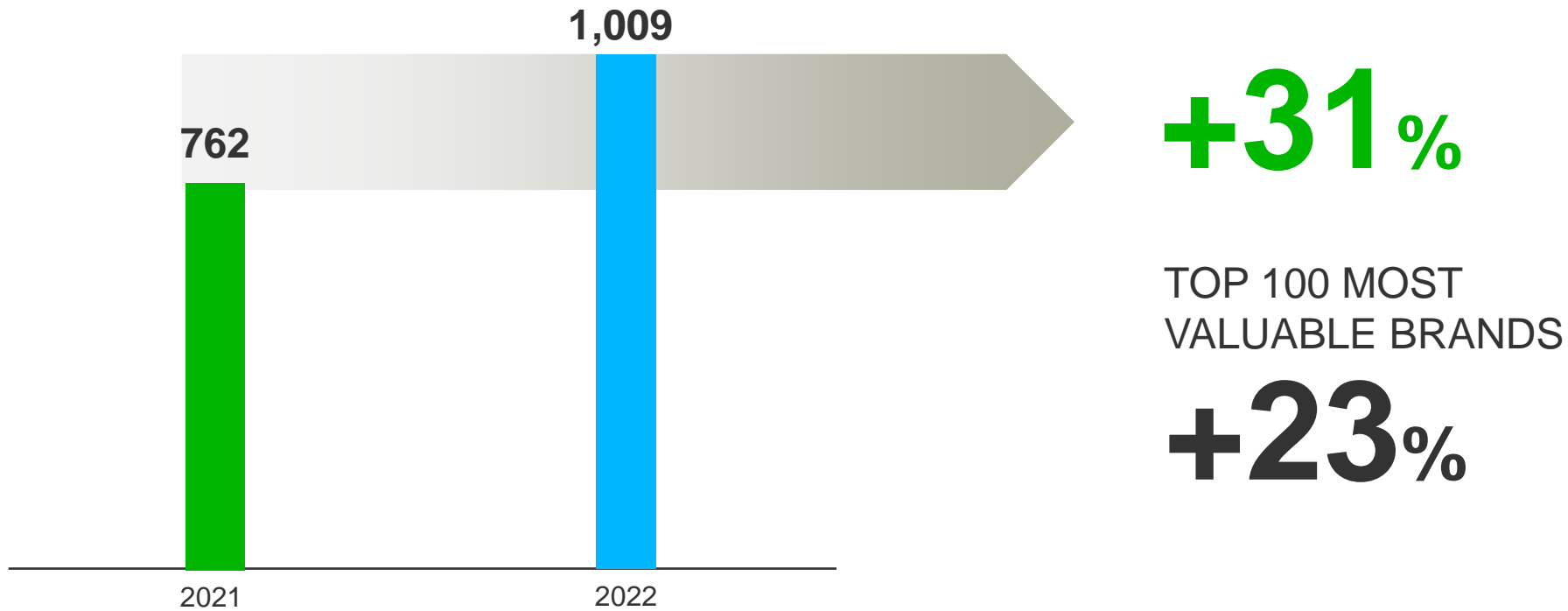
57%

want to be more mindful of the planet and the environment, but my day-to-day priorities get in the way



# But brands rating highly on the Kantar Sustainability BrandZ Index - where both performance and perceptions are positive - grew value by 31% vs. 2021

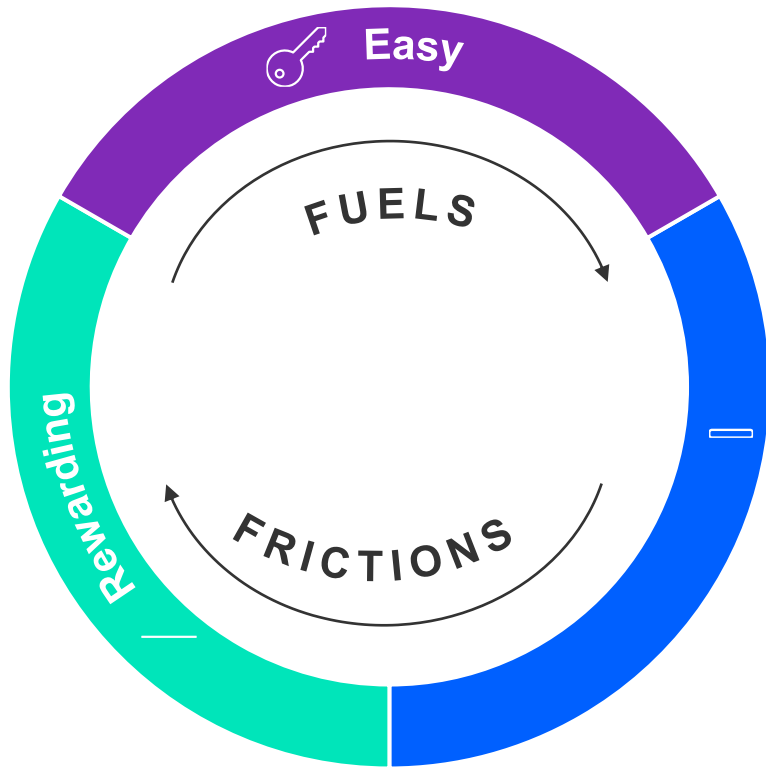
Total Brand Value (\$bn)



People who are taking actions to reduce their waste footprint are spending over \$1.1 trillion in FMCG

\$1.14 TRILLION

# You need to make it easy, meaningful and rewarding for people to make the change



## Key Fuels and Frictions across all behaviours



### EASY

#### Remove the FRICTIONS:

- Too expensive
- No alternative substitutes
- Doesn't occur to them



### MEANINGFUL

#### Motivate to FUEL the change:

- My brands makes the change
- Effortless for me
- More personally relevant



### REWARDING

#### To cement the new behaviour:

- Better experience
- No compromise on quality/experience

Not all consumers are on the same journey towards sustainable living. The different levels of engagement require potentially different intervention levers. Therefore, the importance of these vary by consumer segments