



Growth
from
Knowledge

Crisis as catalyst: staying ahead with green consumers

28-Apr-21



Today's presenters



Petra Süptitz

Director Marketing and
Consumer Intelligence



Lenneke Schils

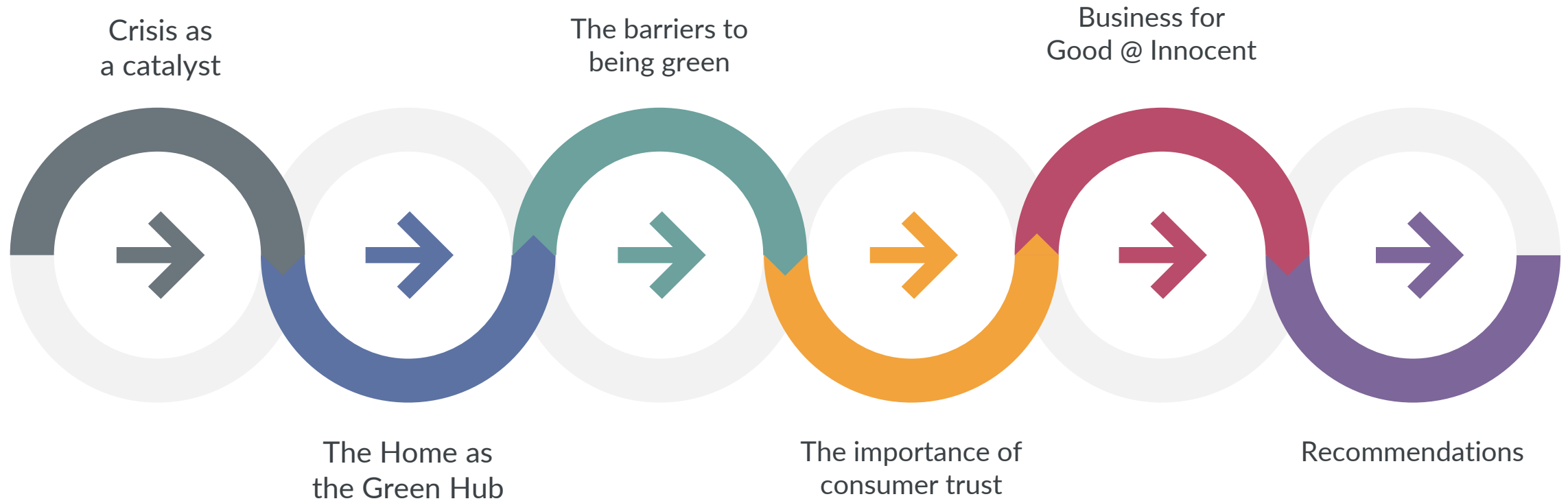
Global Insights Director
Consumer Panel



Benjamin van der Kloet

Head of Marketing (Benelux, Italy
& Iberia) at Innocent drinks

The global story of people, sustainability, and consumption



The full picture

Intelligence on sustainability and the what and the why of shopping behavior with a global or local perspective



THE WHAT AND WHY

Consumer attitude

GfK Green Gauge (Consumer Life Study)

Holistic and trended perspectives provide a full view of consumers relationship with sustainability. Understand why and how sustainability impacts brands in all industries



- 25 countries
- 36,500 consumers; between 1.000 and 1.500 per market

Sustainability & FMCG

Who cares, who does

Understanding the importance, development and real impact of eco-conscious shopping in FMCG for future opportunities.



- 23 countries
- >80,000 consumers
- Single-source purchase data



How are current
trends in green
values impacting
European
consumers?

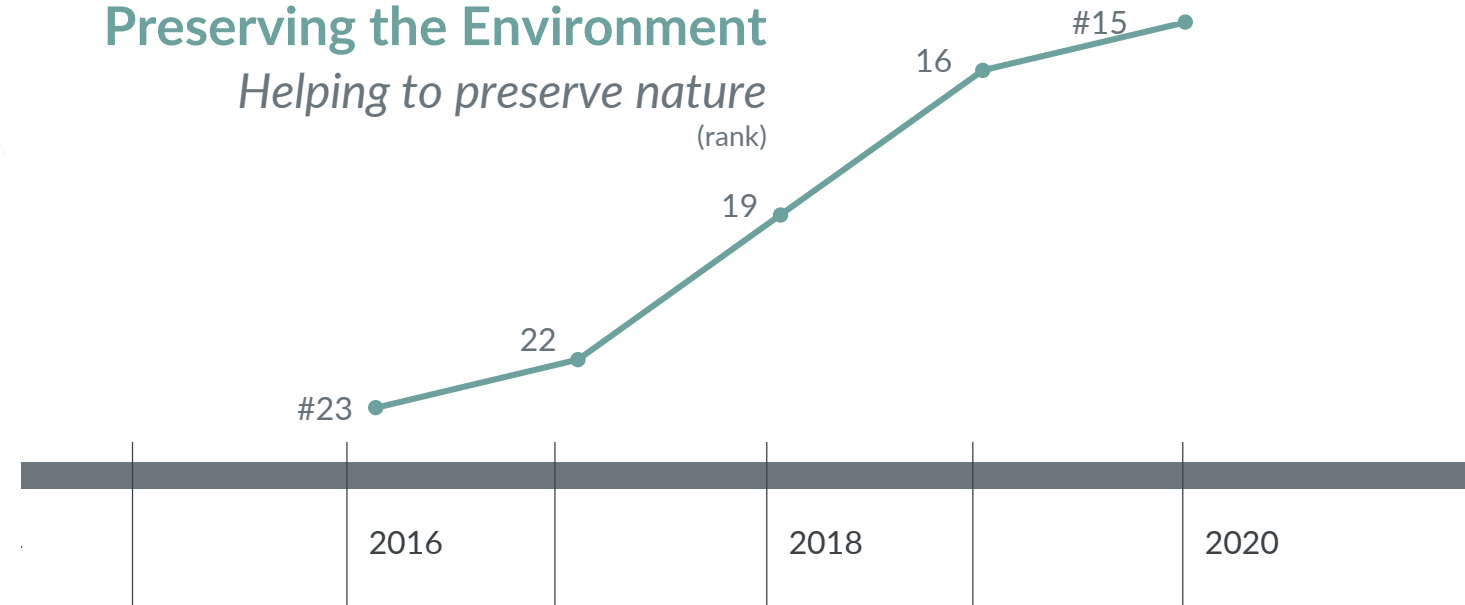
Despite (or because of) the crisis, environmental concerns are top and rising



- Up 10+ ranks
- Up 5-9 ranks
- Up 2-4 ranks
- Up/down no more than 1 rank

Preserving the Environment

Helping to preserve nature
(rank)



#15 personal value (out of 57) in 2020 in Europe,
up 8 ranks from 2016,
Up in 21 countries around the globe surveyed in 2020

People flocked to nature to escape

Cynicism about the environment declines; support rises amid a global pandemic



GfK Green Gauge Global classification of consumers. Based on environmental concerns, attitudes and behaviors

Change in Europe from 2011 - 2020

JADED

↓ -5 pts



↑ +2 pts

Glamour
GREEN

↑ +10 pts

Global youth leads on sustainability



In 2019, Gen Z led record strikes for the environment to urge their governments to slash greenhouse gas emissions

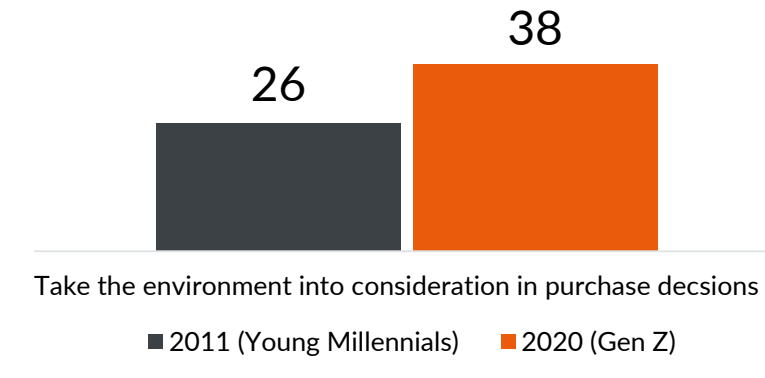


Preserving the Environment

Rank out of 57 personal values (Europe)



Gen Z is “greener” than Millennials at the same age
% European 15-21 year olds (2011 vs. 2020)



GfK Consumer Life Global 2011 to 2020 (Europe = BEL, F, GER, IT, ES, SWE, UK, RU)

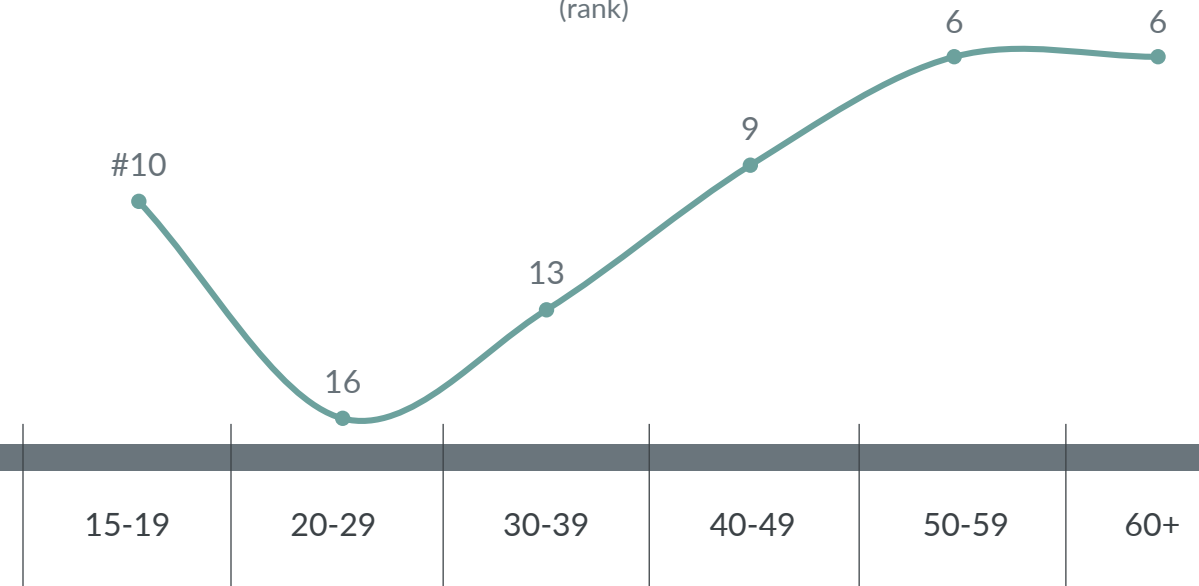
But it is not only Gen Z who acts sustainably

Gen X and Boomers take over responsibility for the environment



Preserving the Environment

Helping to preserve nature
(rank)





How does sustainability affect the **daily life** of consumers?

Conservation of energy is the top behavior



Top sustainable activities in 2020 (European average)

Conserve energy at home



73%

Recycle



72%

Conserve water at home



65%

Travel in an eco-friendly way
when possible



38%

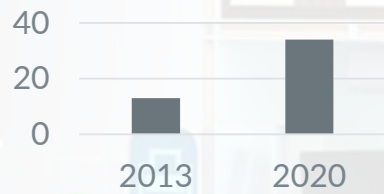
Consider environmental protection
when making purchases



36%

A+++ rising across all markets in Europe

A+++: European MDA Market



-  Highest in GER (48%)
-  Lowest in FR And GB (28%)
-  Growing fastest in Italy (24%)



Energy efficiency is the most important feature when selecting appliances (Europe Average)



68%

Dish washer



65%

Refrigerators

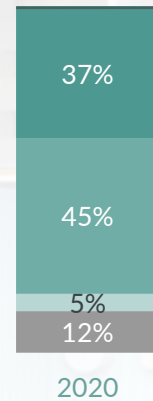
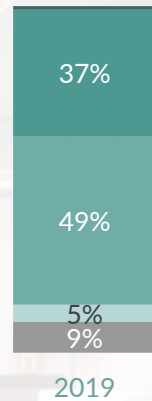
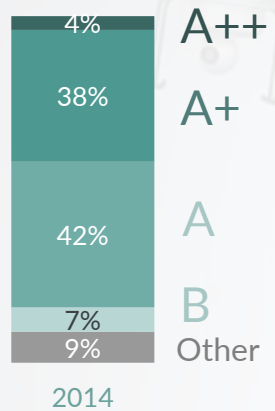


62%

Washing machines

Energy efficiency plays a lesser role for TVs because other aspects are more important here

European PTV/Flat market: energy label development (units)



Importance when selecting a TV (Europe Average)

56% Display quality

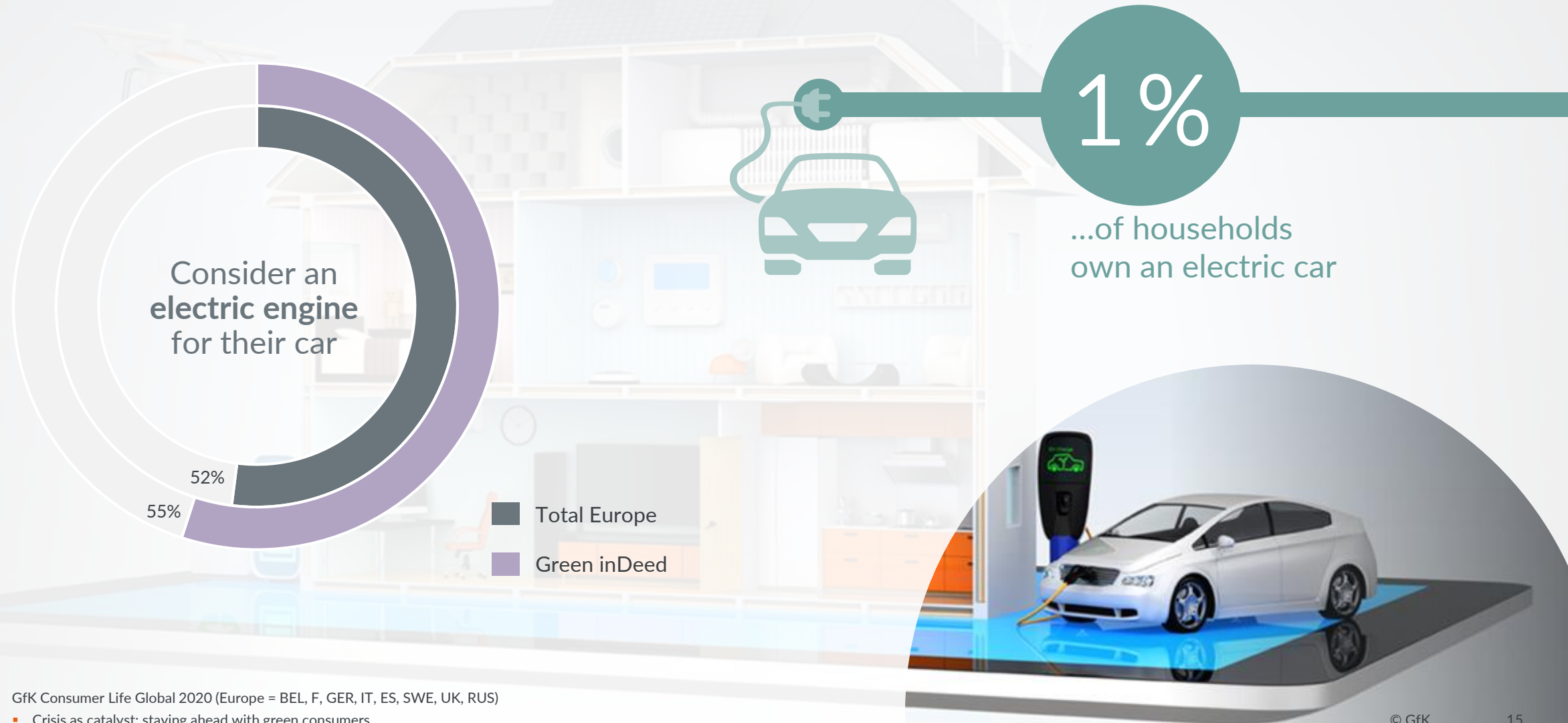
55% Smart TV online app access

Importance of energy efficiency when selecting a TV (Europe Average)

24%



Expectations are also changing in the area of mobility



Eco-activism in FMCG is rising

Biggest concern is plastic waste

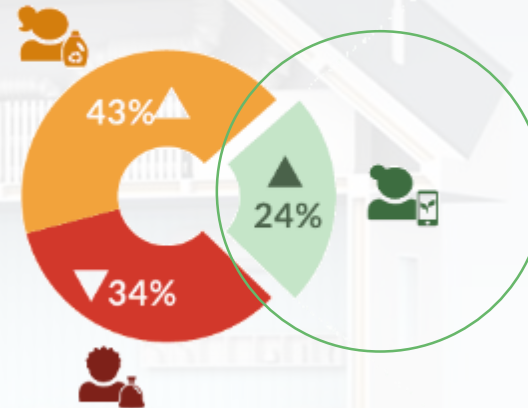


Top concerns EU-10:

- #1 Plastic Waste
- #2 Climate change
- #3 Air pollution

In 2019, global eco-activism was at 16%. This year, it's up to 20%. In Europe it's even higher: 24% are taking prompt measures to cut down plastic waste.

% of shoppers in EU10, 2020

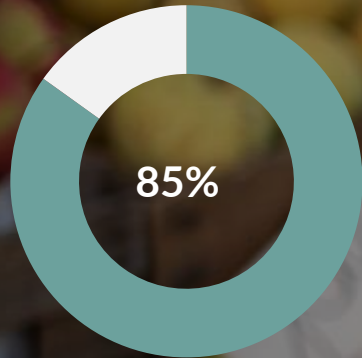


Top: Germany (38%)

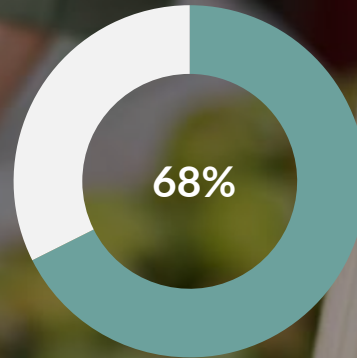
Low: CZ (18%)

Off the chart: Russia 5%

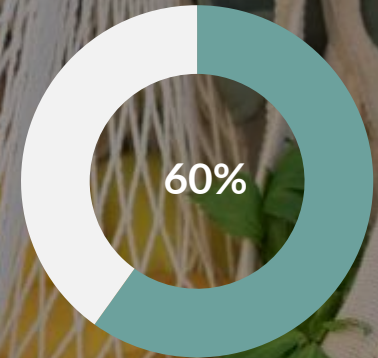
Top/bottom actions and behaviors



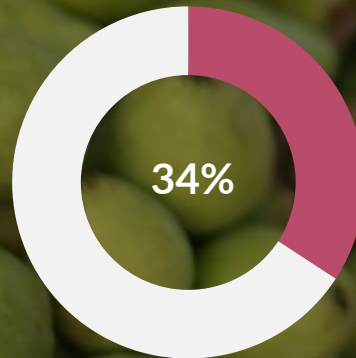
When I buy groceries and drugstore articles, I have a bag / basket with me to carry my purchases.



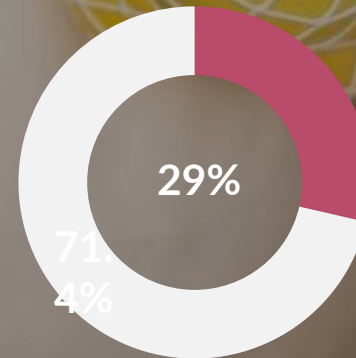
When I go out and take drinks with me, I use refillable drinking bottles.



If a refill pack is available I choose it



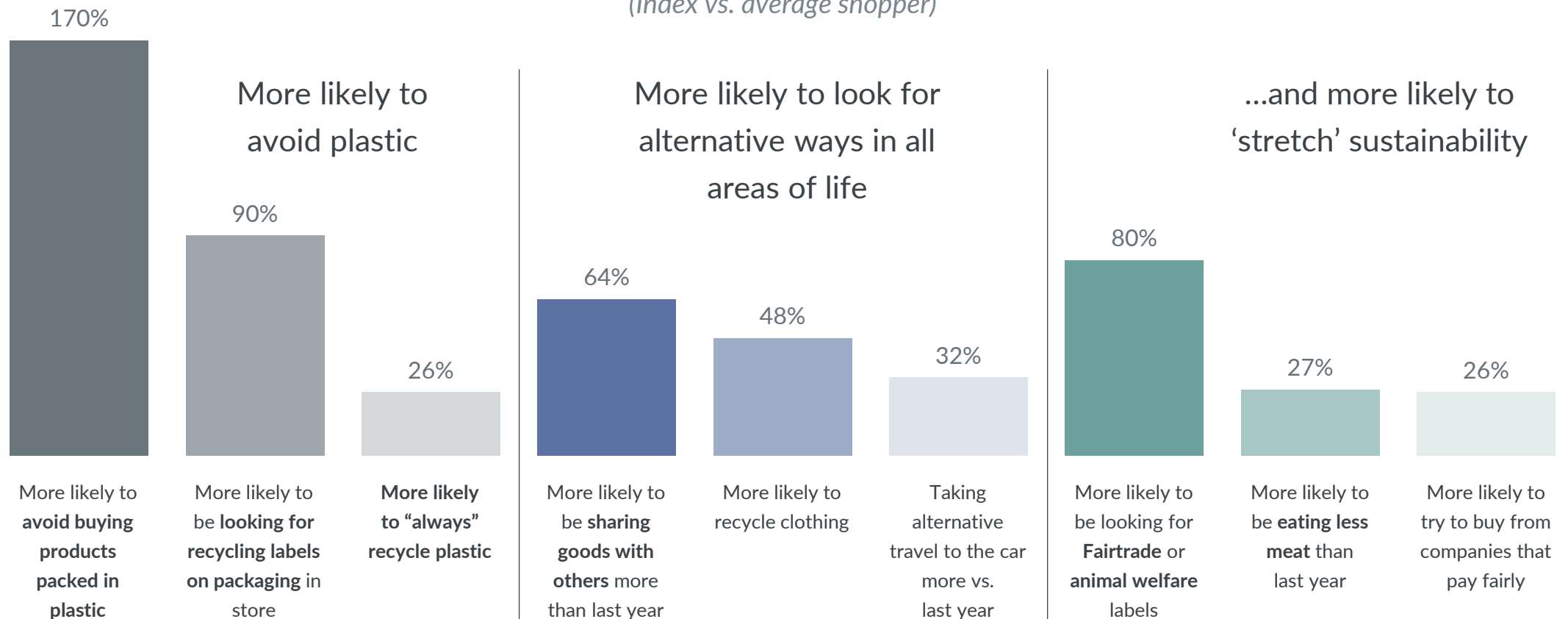
I deliberately avoid buying drinks in plastic bottles



When buying products, I make sure that they are not packed in plastic

Plastic singled out as it is the main concern, but those that take action take wider sustainability measures

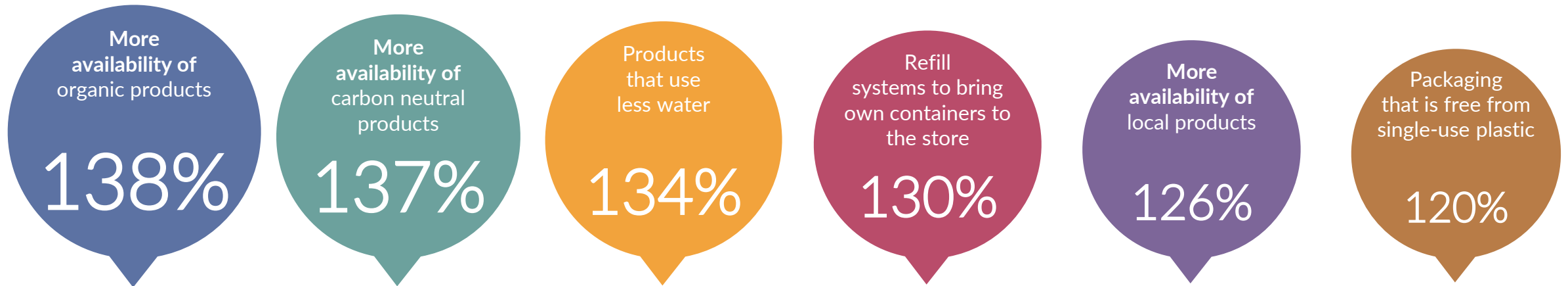
Eco-actives (Index vs. average shopper)



GfK Who Cares Who Does 2020 EU-10.

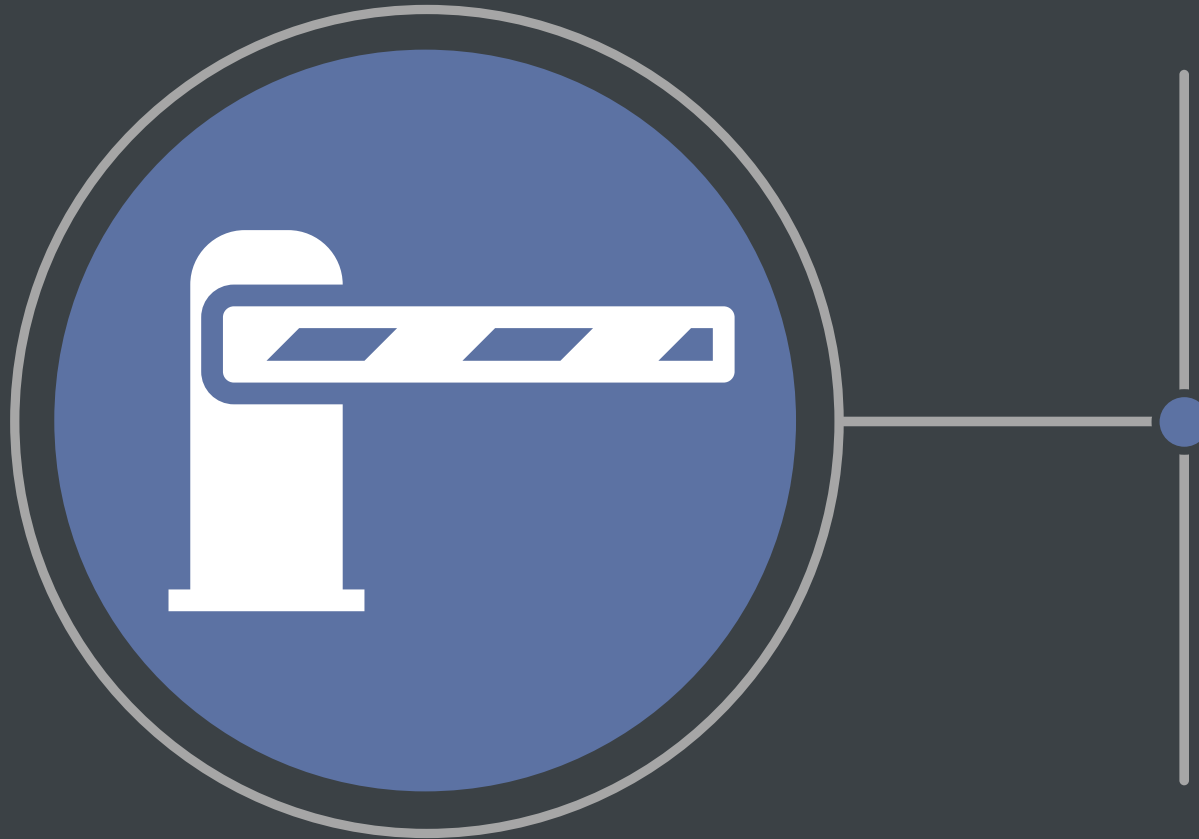
Eco-actives are open to many different solutions

Eco-actives (*Index vs. average shopper*)



From brown bricks to green hub

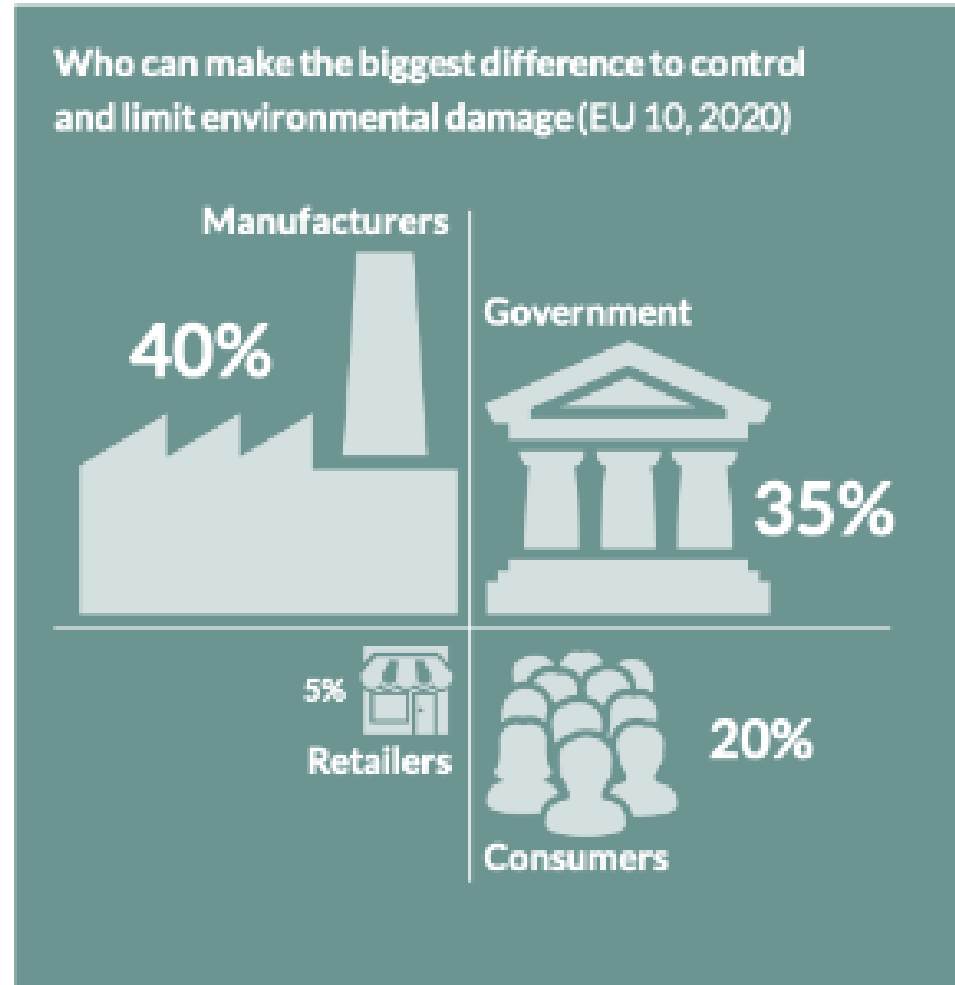




What **barriers** do companies have to overcome?

Relayed responsibility

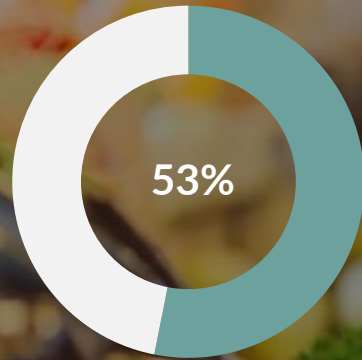
Manufacturers & governments are expected to act



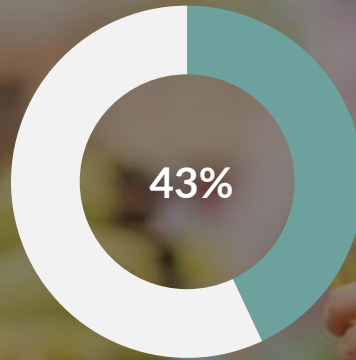
GfK Who Cares Who Does 2020 EU-10.

Opportunity

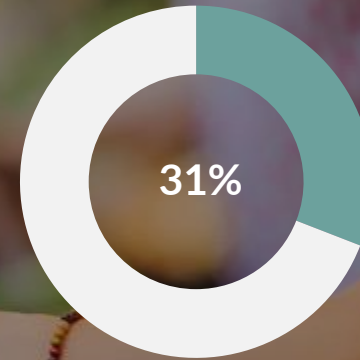
Consumers are waiting for eco-friendly offers that suit their lifestyle



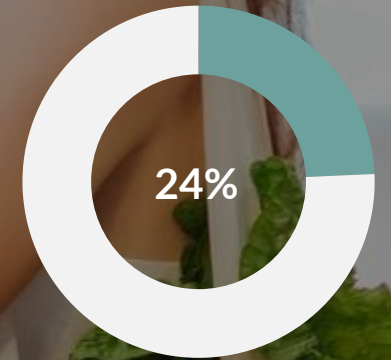
The environmentally friendly alternatives for many of the products I use are too expensive



I would do more for the environment, but I don't know how



The environmentally friendly alternatives for many of the products I use and need just don't work as well



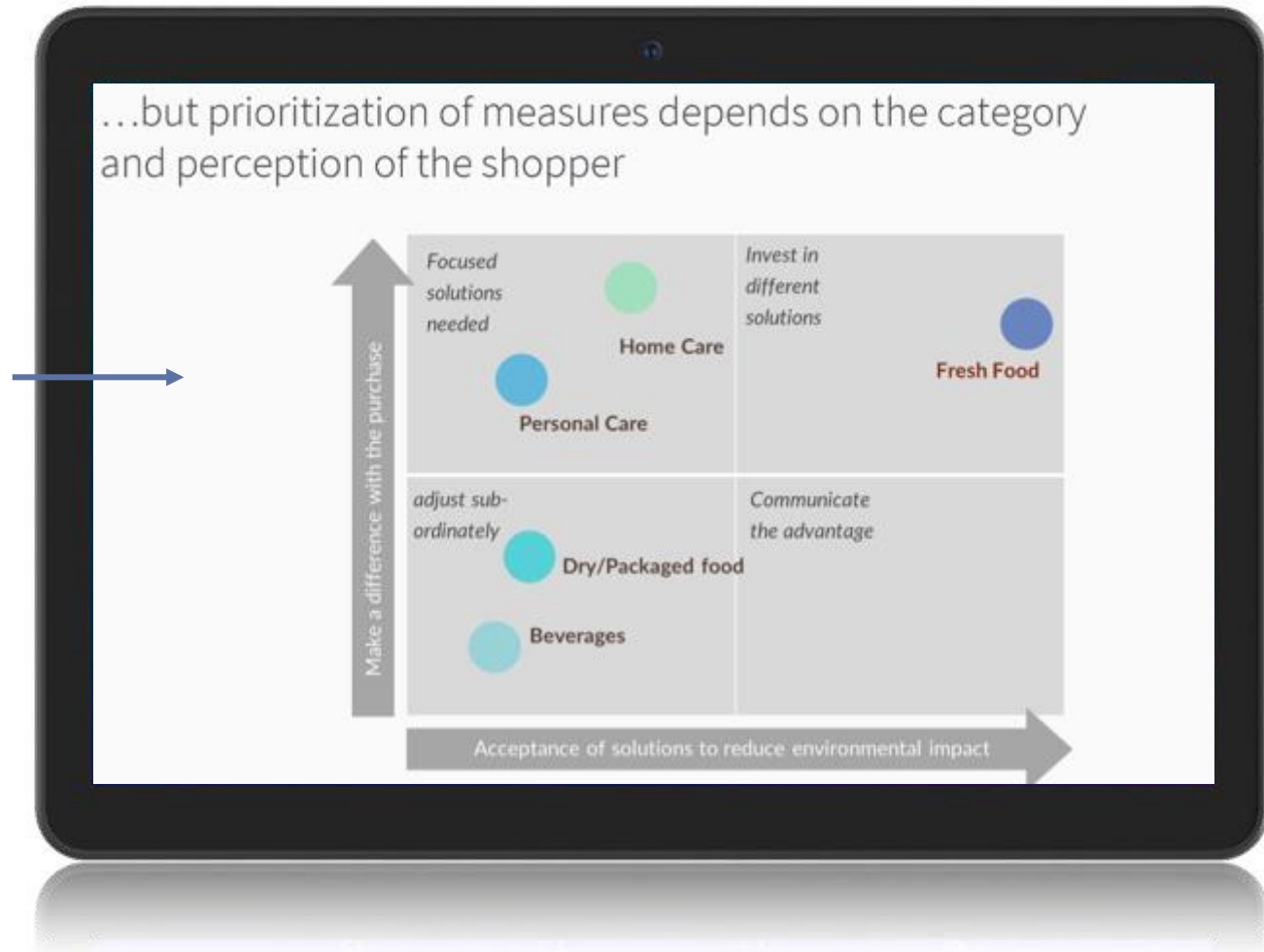
I'm too busy to make my lifestyle as environmentally friendly as I would like

Urgence and acceptance differ

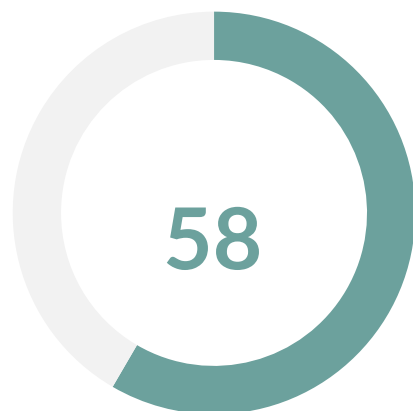
Need to make it an integral part of category management



Need to rethink solutions in
Home and Personal care



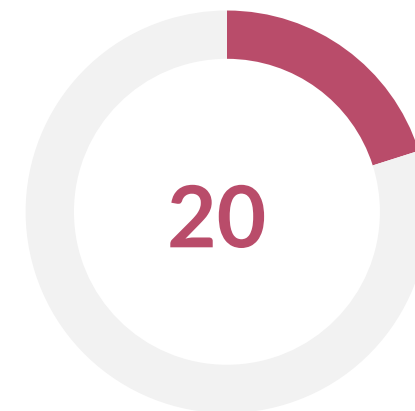
Perception of viable solutions differs



Products in packaging that can be 100% recycled



Refill systems or bring own containers to the store

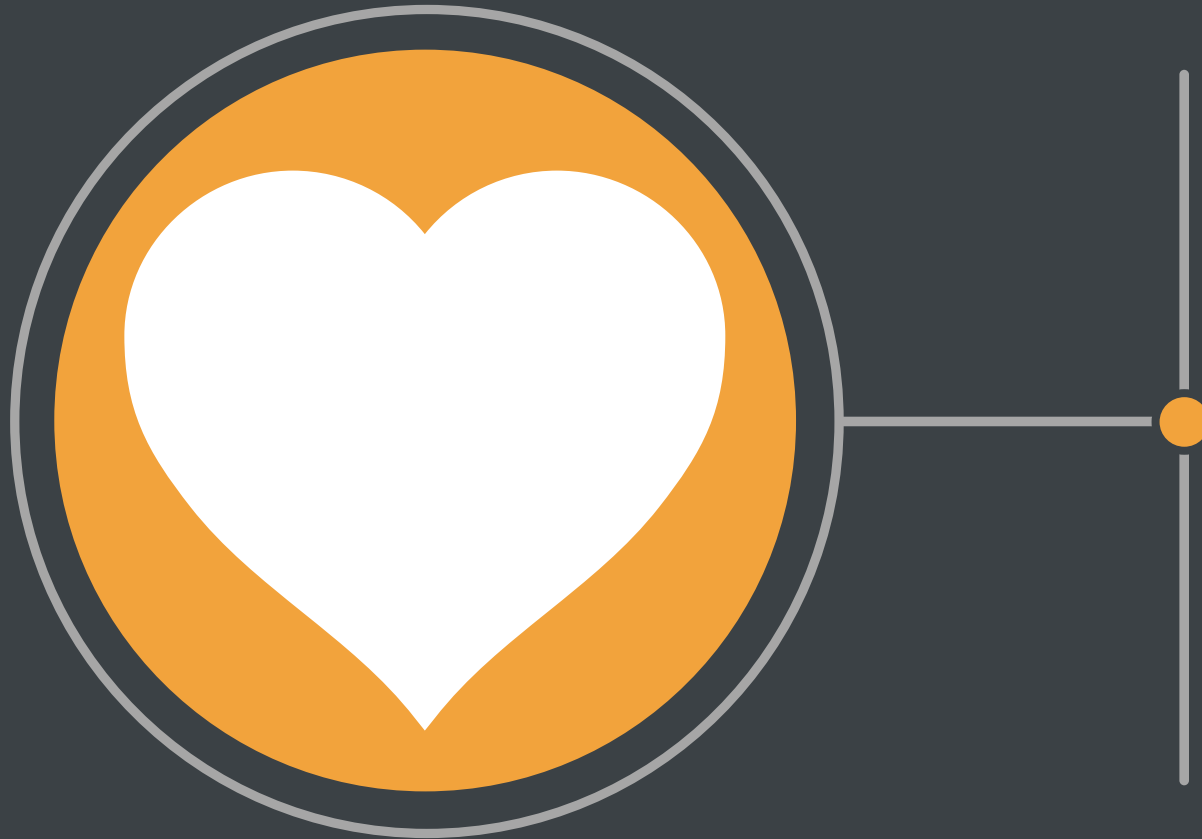


Lighter weight packaging

Solutions to reduce the environmental impact of grocery shopping:
Which work for you?
Category: home care

Business cannot ignore By 2025...



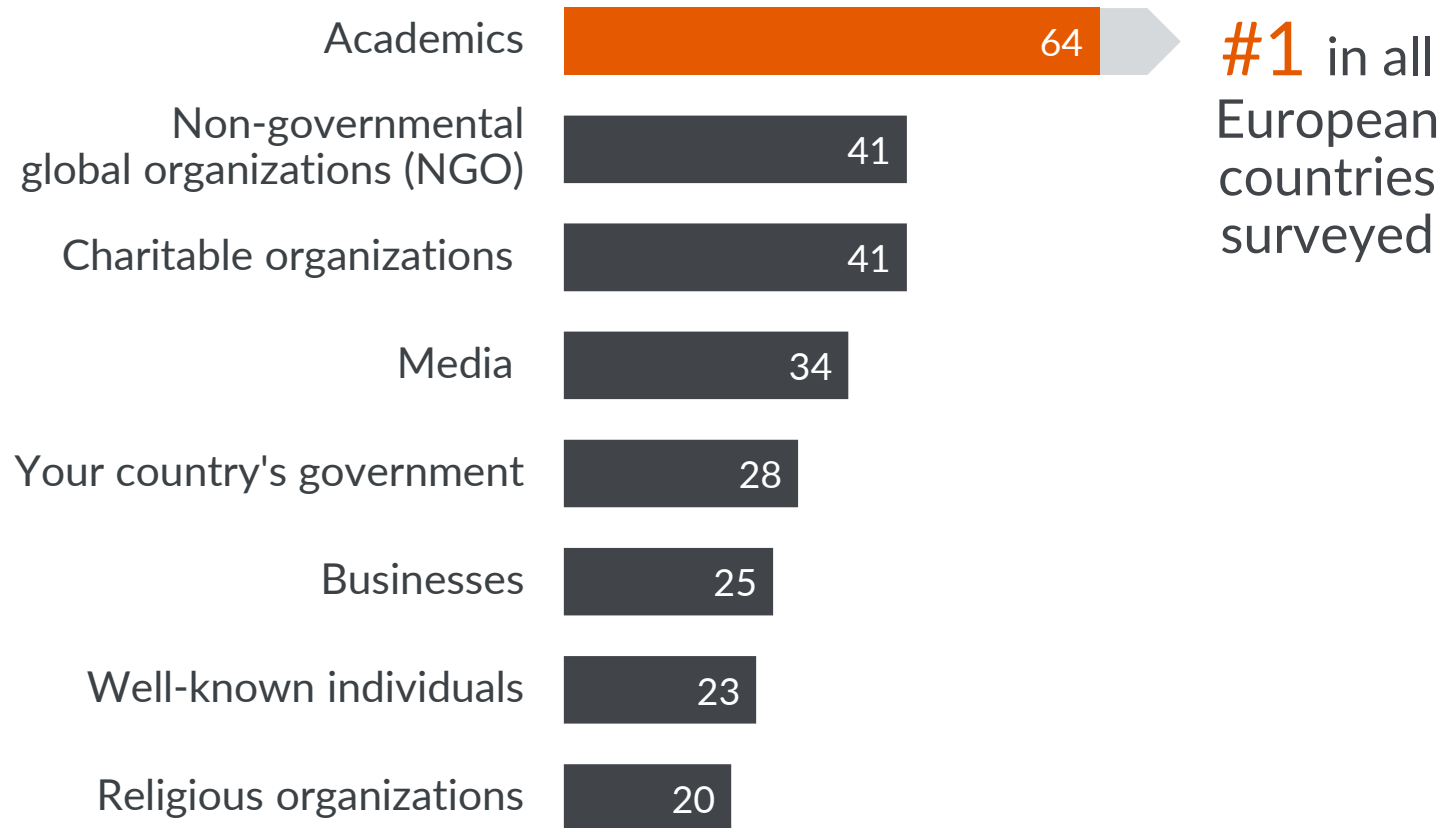


Who do consumers
trust and how can
brands **stay ahead**
of the game and
drive the agenda?

Most types of institutions only enjoy trust from less than half of consumers in Europe



% who trust groups & institutions to tell them the truth



Only a minority of consumers completely trust company claims about sustainability



Believe **environmental claims** on labels/advertising

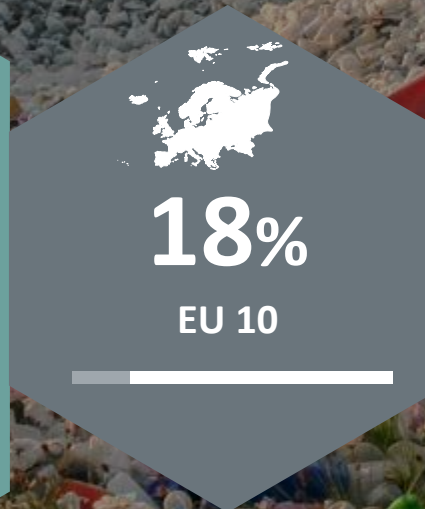
35%

Trust claims companies make about their business practices related to the environment

25%



Can name a brand that does a lot to reduce plastic waste





Business for Good @ Innocent





I am Ben(jamin)

head of marketing BLINI @ innocent drinks

ambidexter

Benanas



Douglas Lamont
Chief Squeezer



Conor Love
Lemonardo Da Vinci



Lois Hinx
Pro-juicer



Jessica Sansom
Sustainability cheer leader



Christiaan van Doornik
Elderberry



Benjamin van der Kloet
Benanas



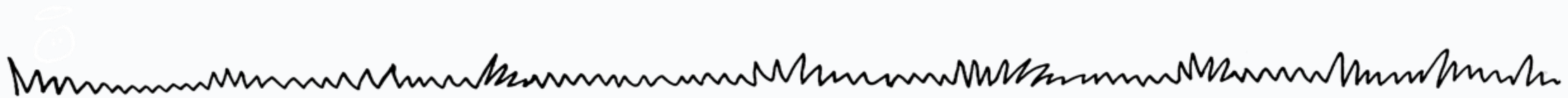
my **top 5 tips** for a successful purpose led business

(so that you don't have to lie at a beauty pageant when you say you want world peace)

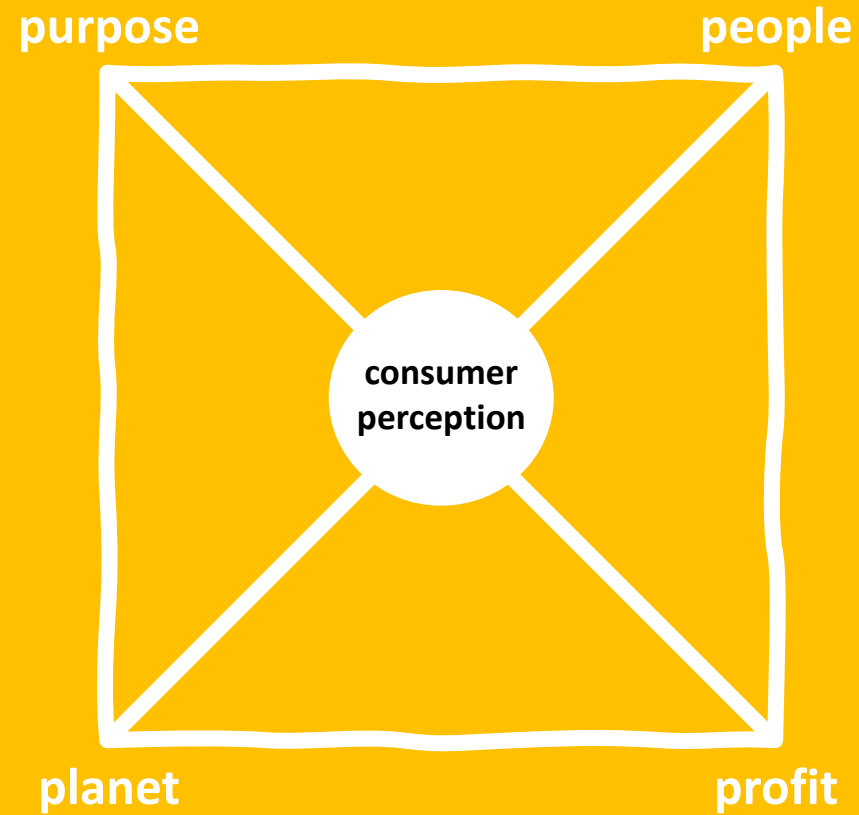


1.

be in it for the long run



that stuff ain't easy



2.

be serious about your purpose

be fun with your people





this is us

BORED







03



3.

**be purpose driven
and values guided**

why do you do what you do?



how do you things?

(innocent) values

be natural

Be yourself & the best version of it
Speak up, honestly and openly
Treat others the way you'd like to be treated – drinkers, customers, everyone



be entrepreneurial

Make things happen – don't wait to be asked
If you're 70% sure, then go for it
Never, ever give in – find a way that works

be responsible

Keep promises & stick to commitments
Leave things better than you find them, be it in the kitchen, the business or the wider world
Don't be lame



be commercial

Always negotiate – be tough & get a great result
Match the time put in to the value created
Keep the main thing the main thing

be generous

Give quality real-time feedback to everyone & don't miss out the tough stuff
Make time to say thanks & celebrate success along the way
Lend a hand with time, skills, experience & cups of tea



4.

be a brand reflected by the inside

we are innocent



where we come from
who we are
how we behave

=



Fruitstock '06. A bit like last year but with taller trees and different bands.

5th - 6th August. 12-9pm. Free.
Regent's Park, London.

Live music from Arrested Development, Norman Jay, Nouvelle Vague, AIM, Breaks Co-op and London Community Gospel Choir. Plus a DJ tent, posh food and drinks stalls, farmers' market, tons of kids' entertainment, yoga, knitting corner, the flirting tent and maybe even a smoothie or two.

A free festival for nice people, organised by (us lot at) innocent. www.fruitstock.co.uk

PS: Don't forget to bring your loose change for our charity, Wellchild, and cakes for our home-made cake stall.

fruitstock
the innocent festival



5.
become a B Corp

we became a B Corp in 2018



it's not an overnight job



Certified



Corporation

Certified B Corporations meet the highest standards of verified social and environmental performance, transparency, and accountability.

We are people using business as a force for good.

<https://bcorporation.net/>



my **top 5 tips** for a successful purpose led business

in only 10 minutes

1. be in it for the long run
2. be serious about your purpose, be fun with your people
3. be purpose driven, and values guided
4. be a brand reflected by the inside
5. become a B Corp
6. don't think you'll get there with just these 5 tips

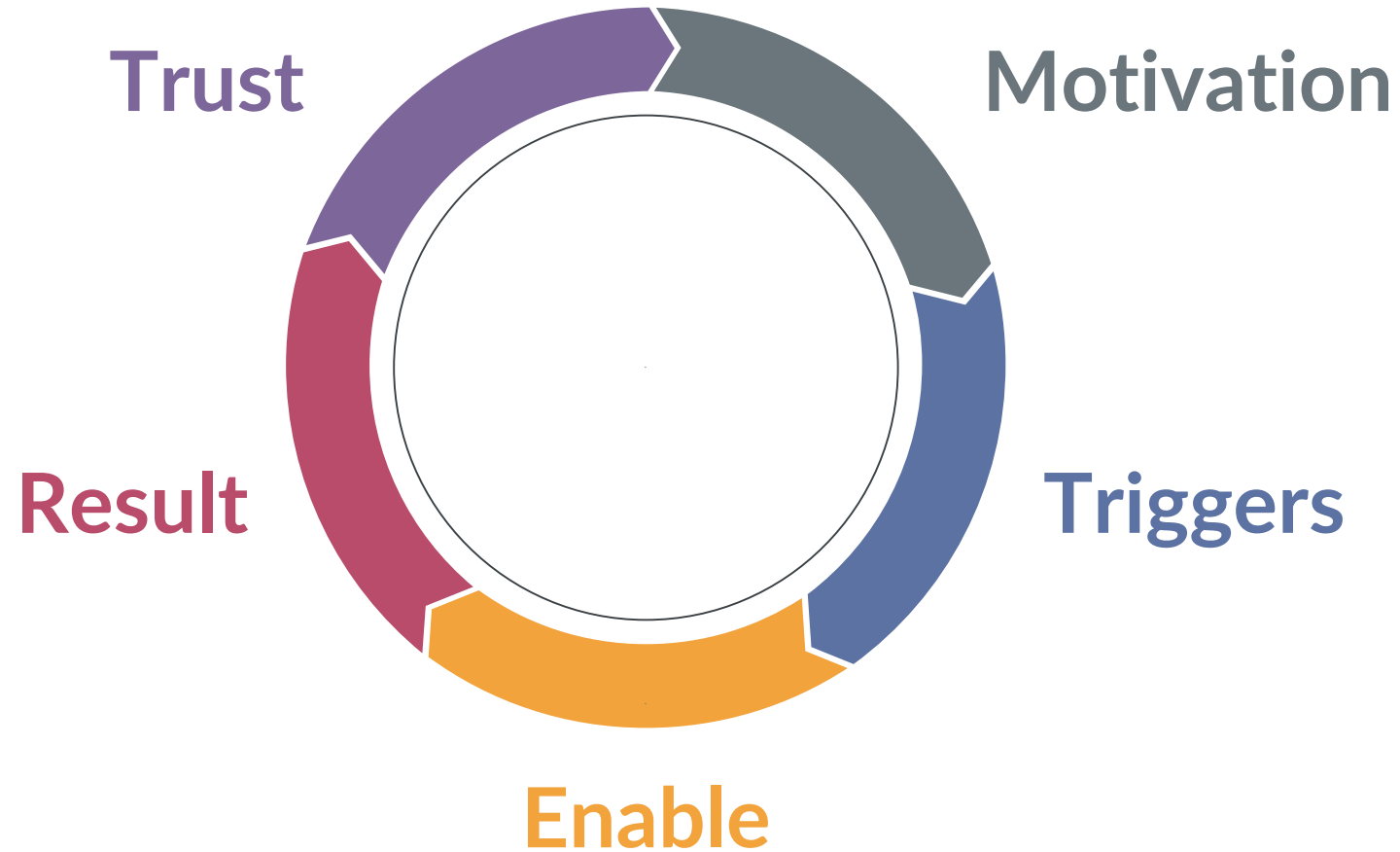




Recommendations

Behavior Change Loop

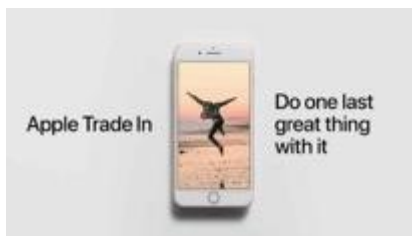
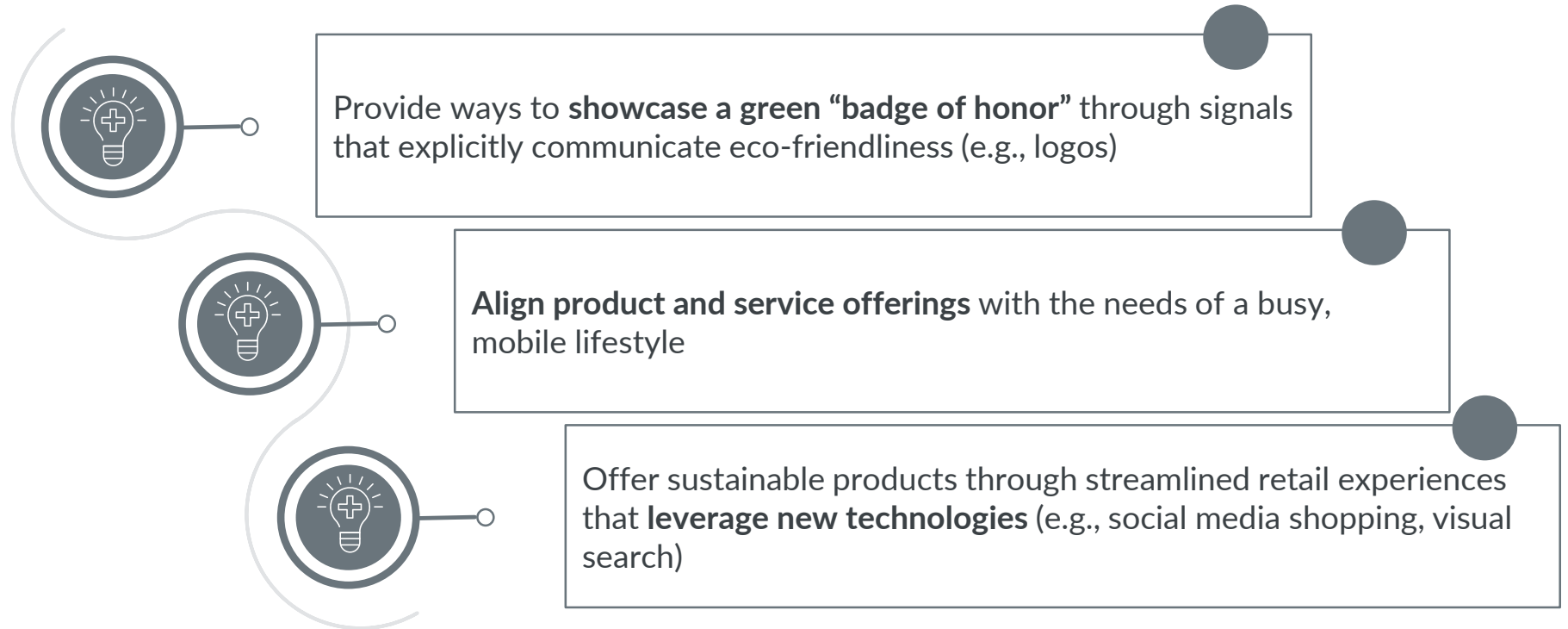
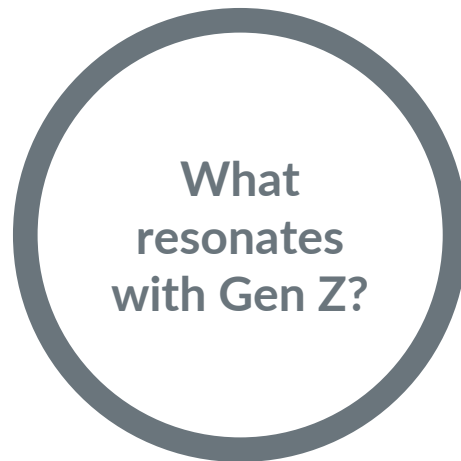
A strategy for each step



GenZ is redefining what it means to be an environmentalist



Think tech savvy and green as a “badge of honor.”



Apple's trade-in program encourages owners to do “one last great thing with” their device. “Do what you love while respecting the planet”

Use the right triggers to convince and inspire your target group



The BMW electric Mini triggers positive experiences



Amazon's Frustration Free Packaging limits negative unboxing experiences



https://www.mini.com/en_MS/home/automotive/allectric.html;

Enable and educate your target group on environmentally friendly behaviour



IKEA shows in its communication that a better world starts at home



Greenly helps to track the carbon footprint automatically



<https://www.ikea.com/us/en/this-is-ikea/sustainable-everyday/a-better-world-starts-at-home-pub2c6b4861>; <https://www.greenly.earth/>

Build scale and therefore convenience



B-Corp boutique at a leading Dutch retailer increases product findability for conscious shoppers



Terracycle's The Loop teams up with manufacturers, retailers and food service to create a closed loop for packaging reutilization



Be prepared for market disruption



Ecovenience at play with smart DIY solutions



Evidence from the German market: Saving bottles, diverting money

3 out of 10 own a (similar) machine

Bottled water bought:

Non-user: 232L/year

Active user: 133L/year

That's 100 liters of bottled water less!

A 100 bottles saved

(and 100 purchases missed)

Unite in results

Increase commitment and loyalty by making it visibly personal



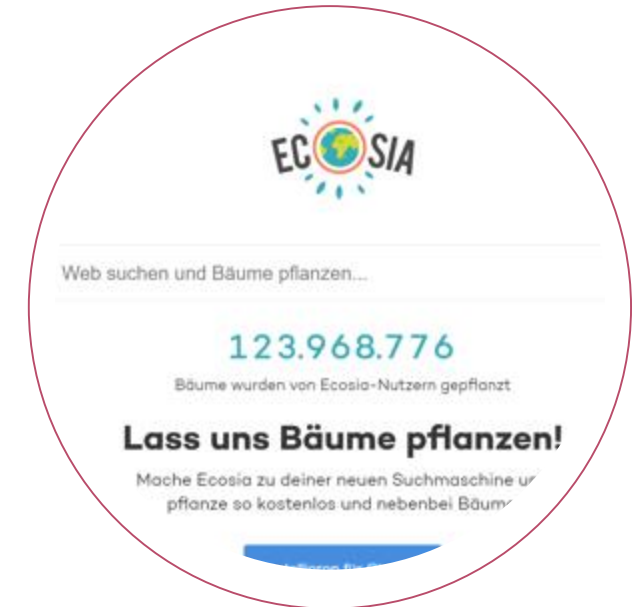
Picnic's personalization of shopping data helps visualize contribution levels



H&M turns old T-Shirts into a baby blanket or a new sweater



Ecosia invests much of the profit in tree planting and communicates the results



<https://www.ecosia.org/>

Build trust. Claims/certifications will be more critical, and more scrutinized than ever before



Adidas is a founding member of the NGO Parley for the Oceans



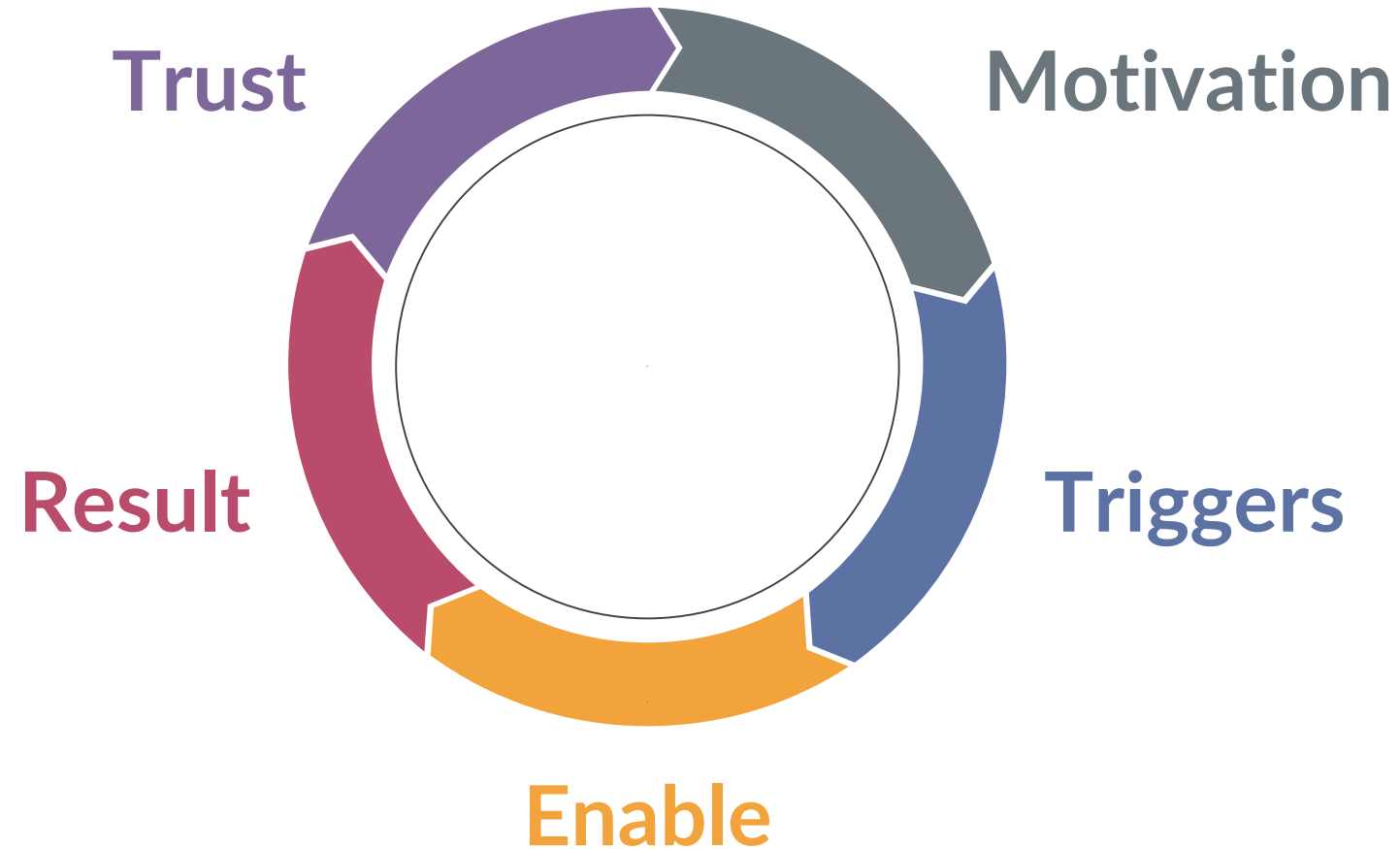
Elon Musk is donating \$100 Million for New Carbon Capture Technologies



https://www.mini.com/en_MS/home/automotive/allelectric.html;

Behavior Change Loop

A strategy for each step



GfK Sustainability Reports



GfK Green Gauge

GfKGreen Gauge® delivers an in-depth look into sustainability-related consumer trends, attitudes, and behaviors in 25 countries. At the heart of Green Gauge is its five-part segmentation based on sustainability attitudes and activities. Built with the marketer in mind, this global system empowers targeting of large consumer groups based on a holistic view of their sustainability perspectives.

Find out more about **Green Gauge Report** and register to [receive a sample report](#)



Who cares, who does?

In this report you'll get a detailed understanding of perceptions of sustainability among FMCG shoppers, the actions shoppers are taking to be more environmentally friendly, and the actions they expect from manufacturers. We link the survey to our purchase panel data so you can directly see the impact of environmental concern on brands chosen as well as product formats purchased at a macro level and for your category(s).

Find out more about our **Who Cares Who Does Report** and [request a sample report](#)

Contact us for more details



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