

**Find your
sustainable
opportunity space
in times of
uncertainty**

GfK Inspiration Days 2023

GfK offers several angles from which to tackle sustainability

You can choose the angle(s) that are most relevant to you at the moment



Choose as many out of the three angles as you like



Discover how to leverage sustainability in your category



Learn the competitive position of your brand(s)



Find the right sustainability target group for your brand(s)

Discover how to leverage sustainability in your category

GfK Green Sector Briefs

Sector briefs help you leverage sustainability in your category



What's in it for you?

Most relevant category insights

Where does the environment rank as a purchase driver?



Which eco aspects are most relevant?



Willingness to pay sector sustainability premium?



Sources of information regarding eco impact?



Which relevance sustainability should have in your business strategy

Which sustainable product features need to be developed first

Whether you can expect a financial gain from playing sustainability right

Where to communicate

In detail: Report content and investment

GfK Green Sector briefs



Content in detail:

Sector User Profile

- Who they are (important demographics)
- Position on sustainability (knowledge, concerns)

Corporate Expectations

- Top responsibilities and expectations of companies
- Industry ratings on sustainability

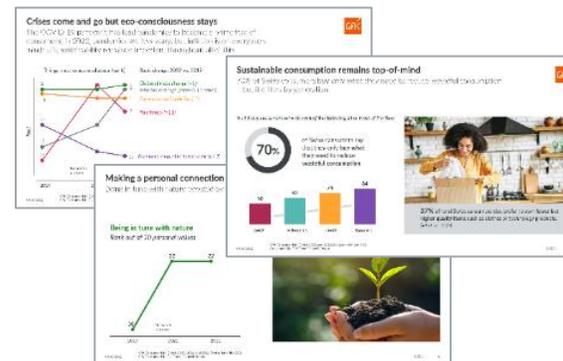
Sustainability purchase impact within sector

- Context: Where environment ranks as a purchase driver
- Important eco aspects in sector purchase decision
- Sources of info for learning about sector eco impact
- Willingness to pay sector sustainability premium



Investment per sector

- € 5.500
- Includes PPT Insights report with summary and recommendations
- As well as an online presentation of the results



Exemplary output of the sector brief

Example: Fashion



Demographic profile

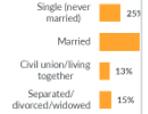
Demographic characteristics of Germans who bought clothing in the past 6 months



72% of Germans have bought clothing in the past 6 months

Compared with 73% total population

Marital Status



7/26/2022 GfK Green Gauge Plus study 2022 SS14 (Germany filter)
GfK Consumer Life Germany Green Gauge® Report

Treat your target group as ecologically versed consumers

They feel they know quite a bit. While a third concede that they know only a little or nothing about environmental problems, they don't seem to see this as an issue. The vast majority of Gen X fashion buyers cannot be persuaded to do more for the environment by being



7/26/2022 GfK Green Gauge Plus study 2022 SS14 (Germany filter)
GfK Consumer Life Germany Green Gauge® Report

Stepping up for the environment appeals to your target group

They appreciate companies being forced to publish impact statements, responsible sourcing. Half of them claim companies should educate them – but only 20% say they would do more for the planet if they knew how

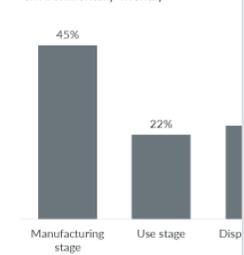


Ideally start with (further) optimizing manufacturing

Fashion buyers consider it the most important stage from an ecological standpoint. In manufacturing, delivery and disposal, try to keep transporting distances as short as possible – and communicate this to your target group



Stages at which it is most important for environmentally friendly



7/26/2022 GfK Green Gauge Plus study 2022 SS14 (Germany filter)
GfK Consumer Life Germany Green Gauge® Report

Environmental impact can differentiate your brand

While the main purchase factors are quality, comfort and price, these are must-haves that every brand (including you) has to deliver on to be considered. Fabric/ texture, look and style, ease of cleaning and eco-friendliness are all v



7/26/2022 GfK Green Gauge Plus study 2022 SS11 (Germany filter)
GfK Consumer Life Germany Green Gauge® Report

Important factor in clothing purchase

- Comfort
- Fabric/ texture
- Look and style
- Ease of cleaning
- Eco-friendliness
- Price
- Quality
- Environmental impact / its effect on the environment
- Past experience with brand
- The brand's country of origin
- Well-known brand
- I want to be seen
- Recommendations
- Offers subscription



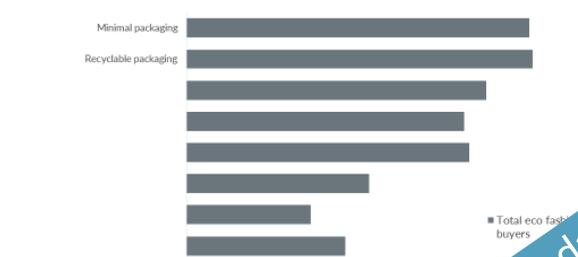
Packaging is your main eco lever for clothing

Minimal and recyclable packaging are by far the most important green factors for your target. While they are concerned about microplastic, only a third pay attention to natural materials – which is below the total eco fashion buyers. In general, Gen X eco fashion buyers are less picky than average



7/26/2022 GfK Green Gauge Plus study 2022 SS43 (Germany filter), filtered on respondents who listed "environmental impact" as a purchase factor for clothing
GfK Consumer Life Germany Green Gauge® Report

Important environmental aspects in clothing purchase decisions (among those who consider the environment important)



© GfK 5

Fictitious data

Learn the competitive position of your brand(s)

Brand performance module

Brand performance module tells you how you measure up

What's in it for you?



Most relevant insights

How does your brand perform against green category expectations? How are your competitors measuring up?



Who your biggest competitor is in the green space

What green strengths you should communicate

What green weaknesses you should mitigate

Where there are white spaces in the market you can claim

In detail: Report content and investment

Brand performance module



Content in detail:

Your brand's performance on

- Rating of overall sustainability
- Cross-category sustainability expectations
- Sustainability expectations in your category
- All of these aspects in comparison to the performance of your key competitors

GfK Green Gauge lens, per segment

- Awareness and consideration of all brands
- Popularity of all brands (first choice)
- Overall rating of your brand on sustainability against the competition



Investment for Germany

- € 7.500
- Includes PPT Insights report with summary and recommendations
- As well as an online presentation of the results

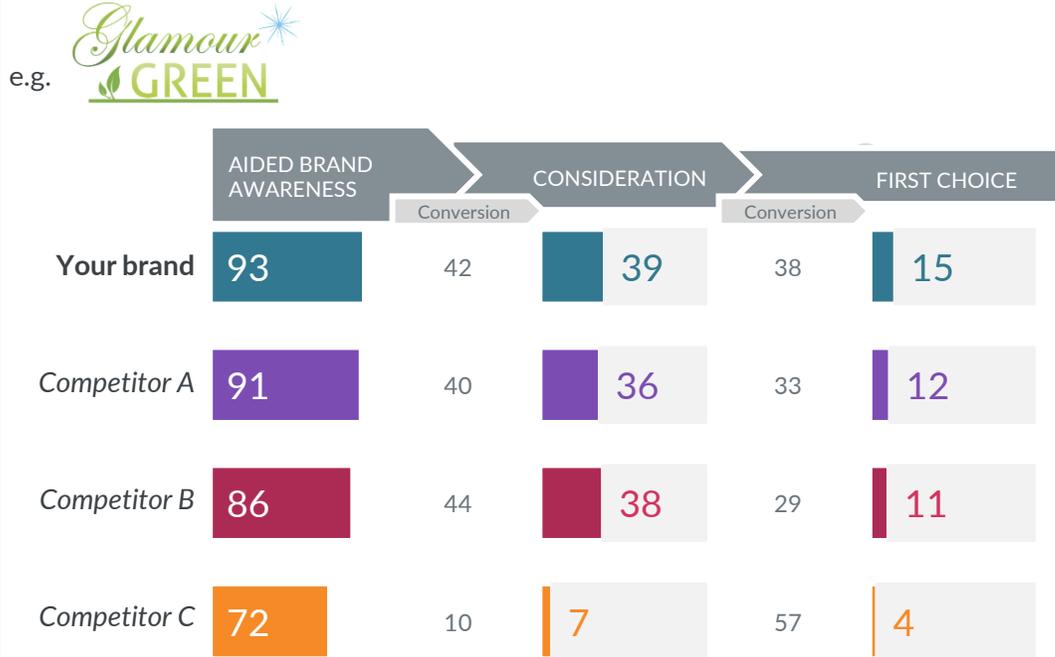


Exemplary output of the brand performance module

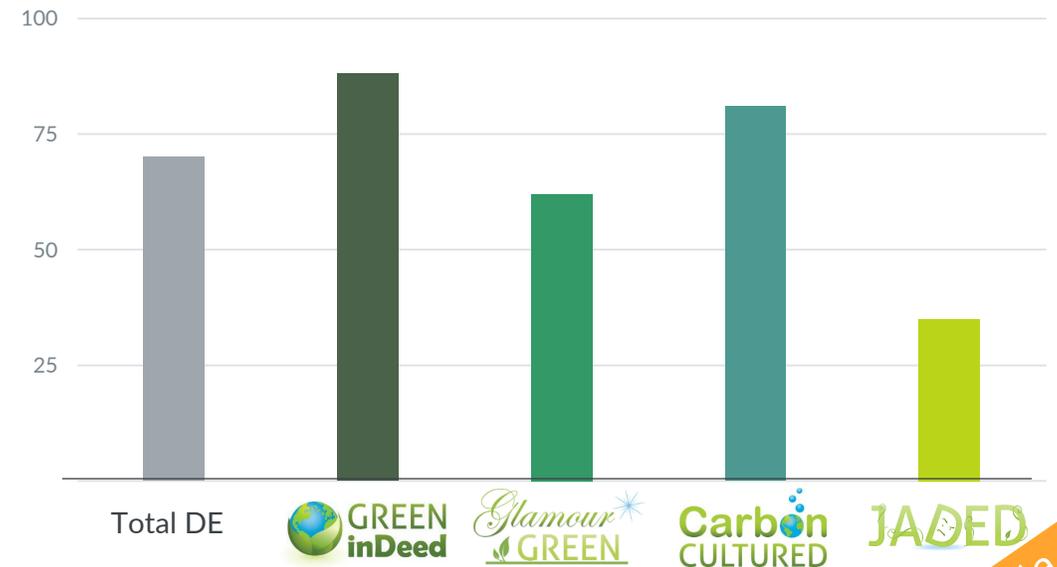
Example: Major Domestic Appliances



Purchase Funnel performance of your brand versus the competition based on each GfK Green Gauge segment (in %):



If you were buying personal electronics, how important is low energy consumption* in your purchase decision? (in %, very/ extremely important)



*Other sector specific purchase drivers available

Fictitious data

Find the right sustainability target group for your brand(s)

GfK Green Gauge
Segment brief



GfK Green Gauge helps you find the right sustainability target



What's in it for you?

Most relevant insights per segment

What is the segment share among the total population?



Whether it this a mainstream or niche target

Which segment fits which type(s) or brand?



Which segment your future sustainability strategy should focus on

Who are they?



Whether your current target groups match your focus segment

How to reach this segment?



How to tailor your products and communication to them in order to maximize your success

In detail: Report content and investment

GfK Green Gauge segment brief



Segment descriptions in detail:

Who are they

- Socio-demographics
- Lifestyle, interests and activities
- Personal values

Sustainability motivations

- Sustainability concerns and attitudes
- Green behaviors in general
- Green behaviors in your category
- Relevance of sustainability for shopping decisions in your category

Shopping behavior

- Purchase relevant attitudes and behavior
- Sources of information and communication channels

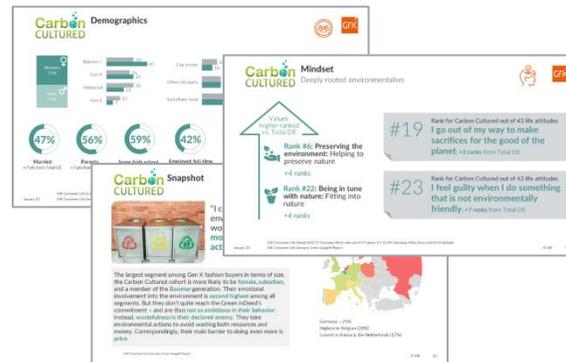
How to engage

- Recommendations on how to engage each segment enriched with examples



Investment

- € 6.450
- Includes PPT Insights report with summary and recommendations
- As well as an online presentation of the results



GfK Green Gauge segments cover a spectrum of sustainability



They provide marketing guidance across the spectrum of sustainability attitudes, behaviors, and opportunities

	Approach to environment	How to engage them
	The most active in thought and action	Highlight safety/wellness benefits; support social issues; invest in omnichannel retail
	Green is a badge of honor/status symbol	Showcase eco-status; align with busy lifestyle; leverage new technologies
	Pro-environmental attitudes, but focus on “easy” behaviors	Make going green easy; focus on need-to-know information; highlight affordability
	Willing, but not able – need the tools	Align with social values; offer value for money; educate about emerging retail
	Skeptical, cynical, but still participate sometimes	Focus on the basics; quell safety concerns; offer dynamic in-store marketing efforts

Exemplary output of the Green Gauge segment brief

Example: Fashion



Carbon CULTURED Snapshot

The largest segment among Gen X is the Carbon Cultured cohort is more likely to be a member of the Boomer generation. Involvement into the environment is high among all segments. But they don't quite reach the commitment - and are thus not as ambitious. Instead, wastefulness is their declared environmental action to avoid wasting money. Correspondingly, their main barrier is price.

Carbon CULTURED Demographics

Women 55%
Men 44%

Boomer +
Gen X
Millennial 19%
Gen Z 7%

47% Married +7 pts from Total DE
56% Parents +7 pts from Total DE
Some other +6 pts from Total DE

Carbon CULTURED Environmental concerns

Extremely worried about our planet, especially pollution

92% of Carbon Cultured say "environmental pollution" is a very/ extremely serious issue +19 pts from the German total

87% of Carbon Cultured say "global change/ global warming" is an extremely serious issue +16 pts from the German total

Opportunity spaces for your brand

Exemplary output of GfK Green Gauge segment shares

Carbon CULTURED Mindset

Deeply rooted environmentalism

#19 Rank for Carbon Cultured out of 43 life attitudes
I go out of my way to make sacrifices for the good of the planet; +3 ranks from Total DE

#23 Rank for Carbon Cultured out of 43 life attitudes
I feel guilty when I do something that is not environmentally friendly; +7 ranks from Total DE

Values higher-ranked vs. Total DE

Rank #6: Preserving the environment: Helping to preserve nature +4 ranks

Rank #22: Being in tune with nature: Fitting into nature +4 ranks

GREEN inDeed

Win in the green space; *feasibility to be discussed

Fictitious data

Have we sparked your interest?

Feel free to get in touch with us



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