

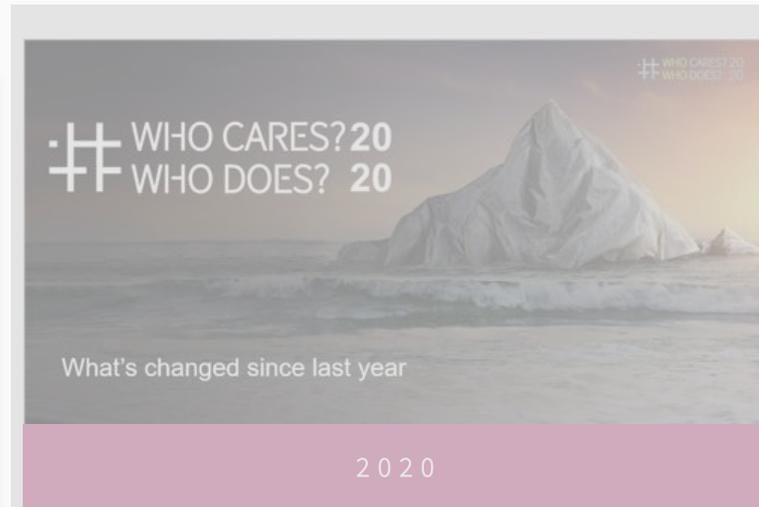


WHO CARES? 20
WHO DOES? 21

3rd edition of Global Sustainability survey, 2nd edition in Hungary



- Top global concerns
- X-country comparison of sustainability levels
- Focus on plastic waste, causes, impact and barriers to doing more
- What shoppers would pay more for
- Who are the Eco-actives



- What's changed? Are we making more/less sustainable choices
- Broad sustainable actions
- Recycling frequency and understanding
- Naturalness
- What packaging solutions consumers want



- How to close the value-action gap
- Awareness, communication and packaging
- How shopping behaviour differs by segments
- Motivations and barriers
- Focus on retailers as well as brands

Who Cares? Who Does 2021

WHAT IS IT?

3rd Edition of our annual sustainability survey

- Consistent segmentation trended for 3 years to >60,000 households from 26 countries
- Using our FMCG purchase panels, to provide direct link between sustainability concern and sustainable shopping behaviour
- Country reports available + customisable analyses to purchase available from September 2021

OFFER IN A NUTSHELL

WCWD helps to prove the case for sustainability

- Trended understanding of concern and action to predict financial risk & opportunity
- Measuring brand and product performance with sustainable shoppers
- Learn how to appeal to most sustainable shoppers and close the gap between those that care but can't do.

WHY TO BUY IT

Convince business partners that sustainability delivers and find out how

- When does sustainability concern translate into sustainability purchase.
- Understand and track your brand performance with sustainable shoppers
- Understand which issues and brands stand out for shoppers and overcome barriers to purchasing more sustainably
- Profile and reach shoppers

WHO IS IT FOR

Designed for manufacturers and retailers at the **start of their brand journey**

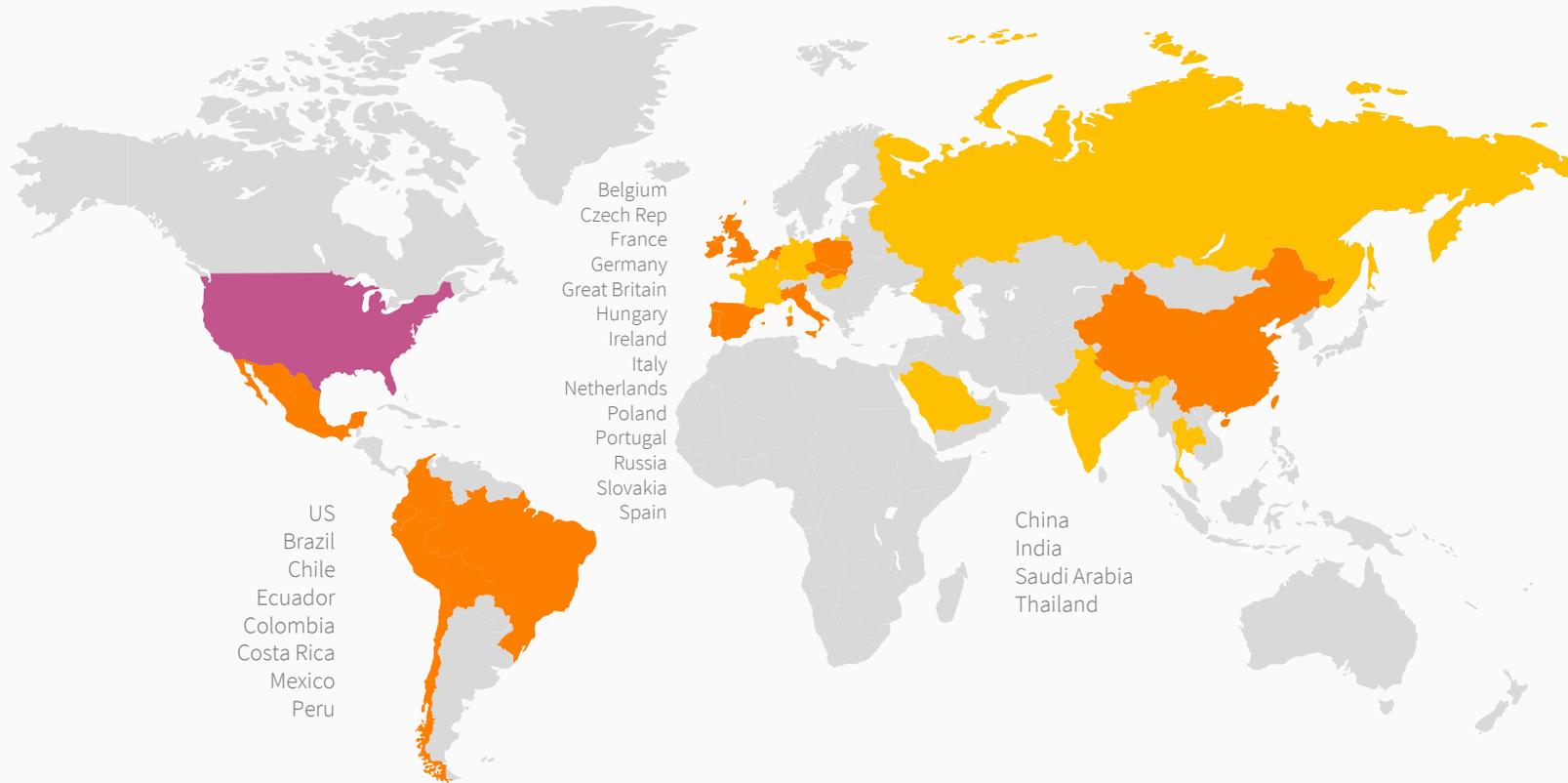
What issues most connect with shoppers and should be aligned to my brand

How to design innovations and communication for different shoppers

What formats, pricing, distribution plans work and what doesn't

Who are sustainable shoppers

Coverage of 26 countries



| Region | Country | Report offer | Field dates |
|----------|---------------|--------------|-------------|
| Europe | Belgium | Compact | Jul |
| Europe | Czech Rep | Full | Jul |
| Europe | France | Compact | Jul |
| Europe | Germany | Compact | Jul |
| Europe | Great Britain | Full | Jun |
| Europe | Hungary | Custom | Jul |
| Europe | Ireland | Full | Jun |
| Europe | Italy | Full | Jul |
| Europe | Netherlands | Full | Jul |
| Europe | Poland | Full | Aug |
| Europe | Portugal | Full | Jul |
| Europe | Russia | Compact | Sep |
| Europe | Slovakia | Full | Jul |
| Europe | Spain | Full | Jul |
| Americas | USA | Survey only | Jun |
| Americas | Brazil | Full | Jun |
| Americas | Ecuador | Full | Jun |
| Americas | Mexico | Full | May |
| Americas | Chile | Full | Jun |
| Americas | Peru | Full | Jun |
| Americas | Colombia | Full | Jun |
| Americas | Costa Rica | Full | Jul |
| Asia | China | Full | Jun |
| Asia | India | Compact | Jul |
| Asia | Saudi Arabia | Compact | Jul |
| Asia | Thailand | Compact | Jul |

Covid-19 has accelerated the need for sustainability change

...revealing the cracks

The Himalayas are visible in India for first time in 30 years as pollution levels started to drop during the lockdown



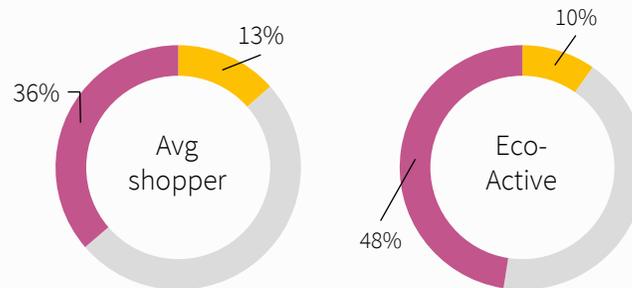
The impact of COVID-19 is all down to inequality

'They don't care about safety': Amazon workers struggle with pandemic demand

...driving consumer demand

Due to the corona pandemic, sustainability aspects have become to me, % of buyers Germany May 2020

more important less important



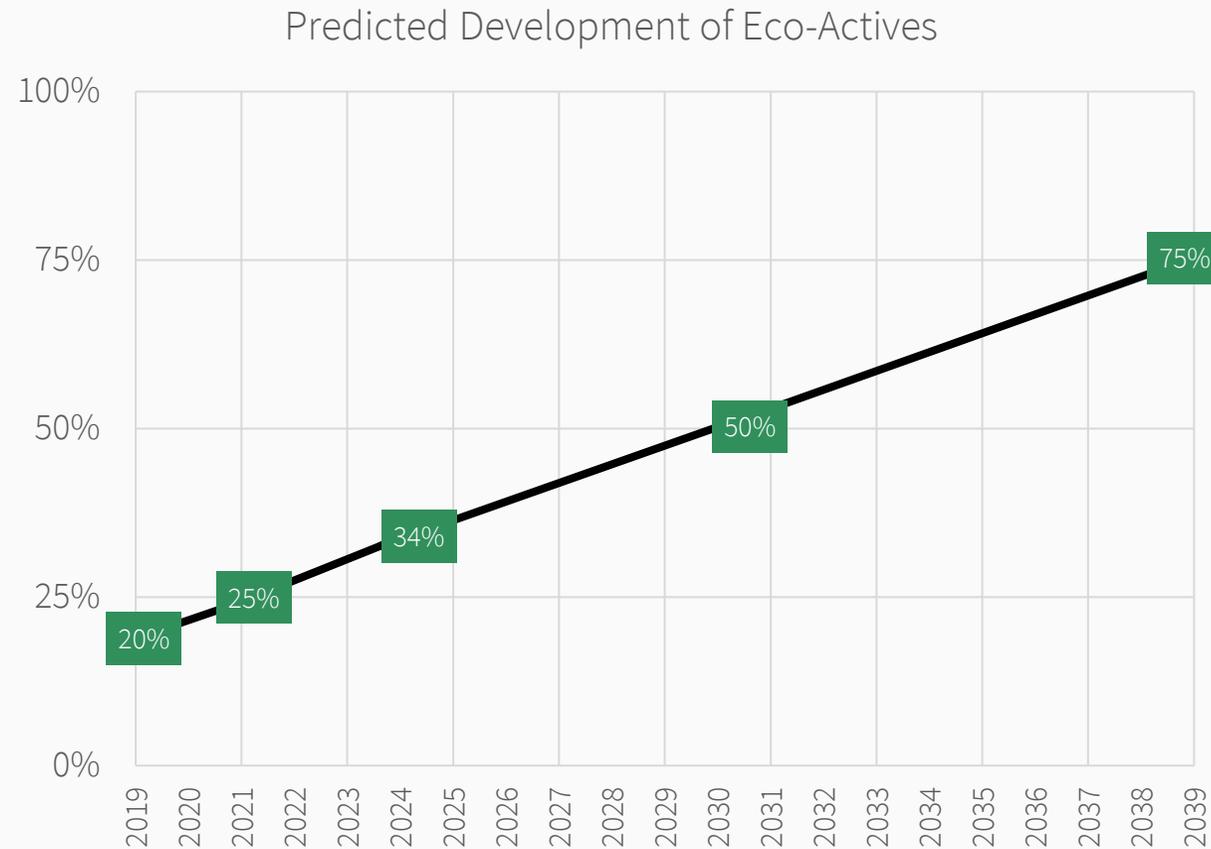
...resetting business strategy

“155 CEOs sign the ‘Uniting Business and Governments to recover better’ statement. EU’s Green Deal at the heart of Europe’s recovery plan”



..and now we predict that half the world will be an Eco-Active by 2031

Predicted milestones for Eco-Actives share of population based on current growth rate



ECO ACTIVES

Shoppers who are highly concerned about the environment, and are making the most of actions to reduce their waste. They feel an intrinsic responsibility to be more sustainable, follow the topic more actively and have a greater awareness.

ECO CONSIDERERS

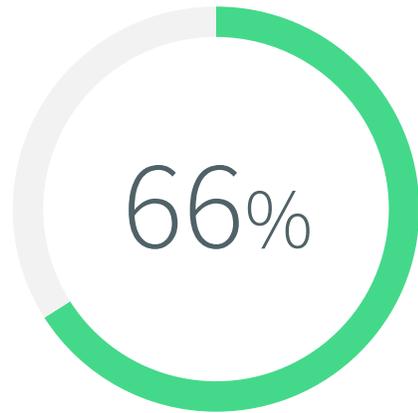
They are worried about the environment and plastic waste, at similar levels to Eco-Actives. But they are actually closer to Eco-Dismissers in how they act, not making many actions to reduce their waste. Their biggest barriers are convenience and price.

ECO DISMISSERS

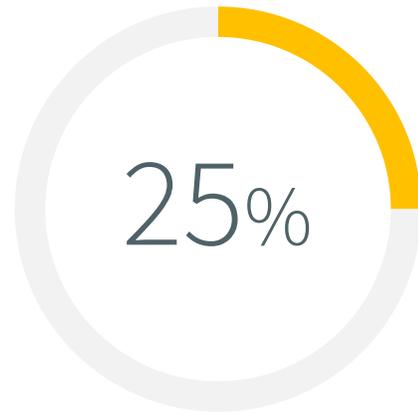
Shoppers who have little or no interest in the environment and making no steps to reduce waste. The topic rarely features amongst friends and family and they are lacking awareness of environmental concerns. They do not think they make a difference.

Plus...there are many shoppers who want to be sustainable waiting for manufacturers and retailers to help them

Try to buy environmentally friendly packaging



people regularly avoid plastic packaging



Value-Action gap worth
\$334bn
globally in FMCG

©Europanel | Source: Who Cares? Who Does? 2020 – agree/strongly agree % Both: Global aggregate of 21 countries;

WHO CARES?
WHO DOES?



Whatever stage of your brand journey you are on we can help convert your action to sales by understanding sustainable shoppers



WHERE TO START

You have your CSR strategy and have implemented changes to your packaging and supply chain.

Now you are looking to *start your journey at brand level and understand what concerns shoppers most.*

How concerned they are, how prepared they are to act and which brands and issues stand out for them

CHANGING BEHAVIOUR

Your brand strategy is in place but you don't think your activations are seen by consumers. *You need to maximise the chance shoppers will choose your sustainable initiative.*

You want to understand your starting point of how well your brand and competitors performs with sustainable shoppers in your category.

You need to understand what sustainable buyers look for, who they are and what are their triggers and barriers.

You need to understand how best to communicate to them and design your packaging strategy for them.

TARGETED ACTION

Your brand strategy is in place and now *you need to reach an audience to communicate to.*

You need to profile sustainable shoppers in your category to understand their sustainable attitudes, *and* their attitudes to health, lifestyle and shopping.

You would like to know their media consumption, which channels and platforms they are most likely to use.

You would like help finding the audience through your media agency.

EVALUATING SUCCESS

You need to *evaluate the impact of your activations on sales*

You need help convincing business partners that sustainability drives purchase decisions or you want to track who buys your sustainable innovation.

You would like to make sustainable buyers a key metric to evaluate your performance against competitors.

You would like to measure the impact of your media campaign amongst sustainable shoppers.

Contents

1. MARKET MATURITY

- Size and share of Eco-actives, Considerers and Dismissers and change vs. last 2 years.
- Size of the value-action gap between those that care and those that do

2. ISSUE AWARENESS

- Ranking of top issues affecting the environment inc. Plastic waste, climate change, water pollution, deforestation etc - 3 year trend
- Awareness of brands and retailers that show a genuine concern for the environment and society.
- What good brands stand for

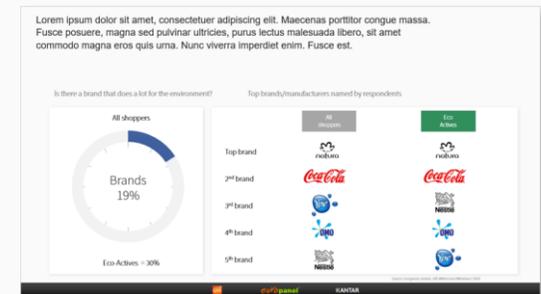
3. PACKAGING & RECYCLING

- What packaging materials are worst for the environment
- What consumers look for on packaging and understanding of recycling
- Ranking of packaging changes that would make shoppers switch brands

4. CONSUMER ACTIONS

- Actions taken to reduce environmental footprint e.g. taking shorter showers, washing at low temperatures, using car less, making DIY alternatives
- Actions taken to reduce plastic waste e.g. refills, shopping bags, loose fruit & veg

Example slides



FMCG Purchase data contents

Purchase behaviour at FMCG level + demographic profiling
 Split by 3 Eco-segments and
 Comparing 2021 sample vs. 2020 sample (option for 2019 sample)

Content:

1. FMCG KPIs - value & volume share, trips per year, avg basket size,
2. Shopping preferences e.g. PL share, online share, value sold on deal share
3. Top 5 categories which over-index and under with Eco-Actives
4. Format share for example categories
5. Product preferences e.g. Refills, Fairtrade, Organic for example categories*
6. Top 10 brands (all categories) which over—index with Eco-Actives
7. Channel (e.g. hypers, discounters) and Retailer (e.g. Edeka, Lidl) Share
8. Demographics inc. Age, Social Class or Income, HH Size, number of children

Notes:

Analyses are all sample size dependent. If not robust Eco-Actives will be grouped with Eco-Considerers
 Only one year of data available in Saudi Arabia
 3 Formats not possible in France. Categories are illustrative of difference in purchasing by segment and chosen by country team
 1,4 Only if variable already exists within country

Example slides



Category Purchase data contents

Purchase behaviour + demographic profiling at category level (one category included as std)

Split by 3 Eco-segments

Comparing 2021 sample vs. 2020 sample (option for 2019 sample)

Content:

1. Category KPIs - value & volume share, spend per buyer, frequency, trip size
2. Brand panel KPIs (up to 5 brands of client choice)
3. Brand share of segment and Segment share of brand (10 brands + PL)
4. Format share and Pack size share
5. Demographics inc. Age, Social Class or Income, HH Size, number of children
6. Retailer (e.g. Edeka, Lidl) Share
7. Category shopping preferences e.g. PL share, online share, promo share
8. Product preferences e.g. Organic

Notes:

Analyses are all sample size dependent. If not robust Eco-Actives will be grouped with Eco-Considerers

Only one year of data available in Saudi Arabia

7,8 one year only and only if variable already exists within country

Example slides



Investment

Hungary

| | NEW BUYERS | REPEAT BUYERS | DISCOUNT FOR REPEAT |
|------------------------------|------------|---------------|---------------------|
| Custom (1 category included) | 3 000 € | 2,600 € | -13% |
| 2nd Cat | 1 800 € | 1,450 € | -19% |
| 3-4th Cat | 1 620 € | | |
| 5th+Cat | 1 530 € | | |