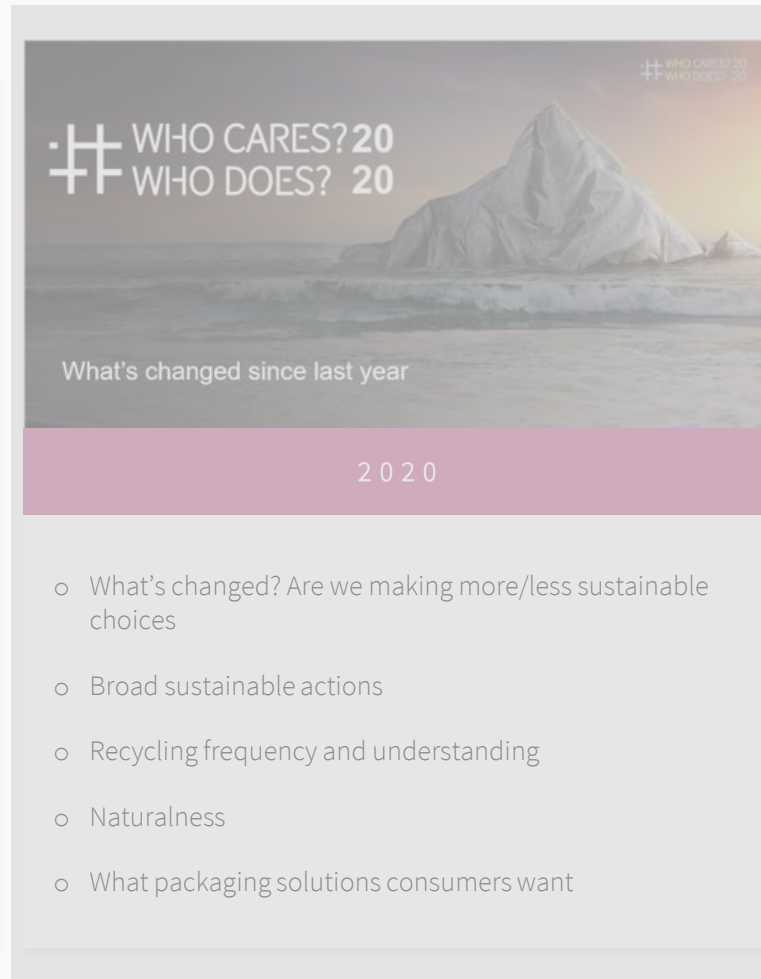
A large iceberg floats in the ocean under a dramatic, cloudy sky at sunset. The sun is low on the horizon, casting a warm glow. The iceberg's tip is visible above the water, while its much larger, jagged base is submerged. Sunlight rays penetrate the water, illuminating the submerged part of the iceberg.

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**

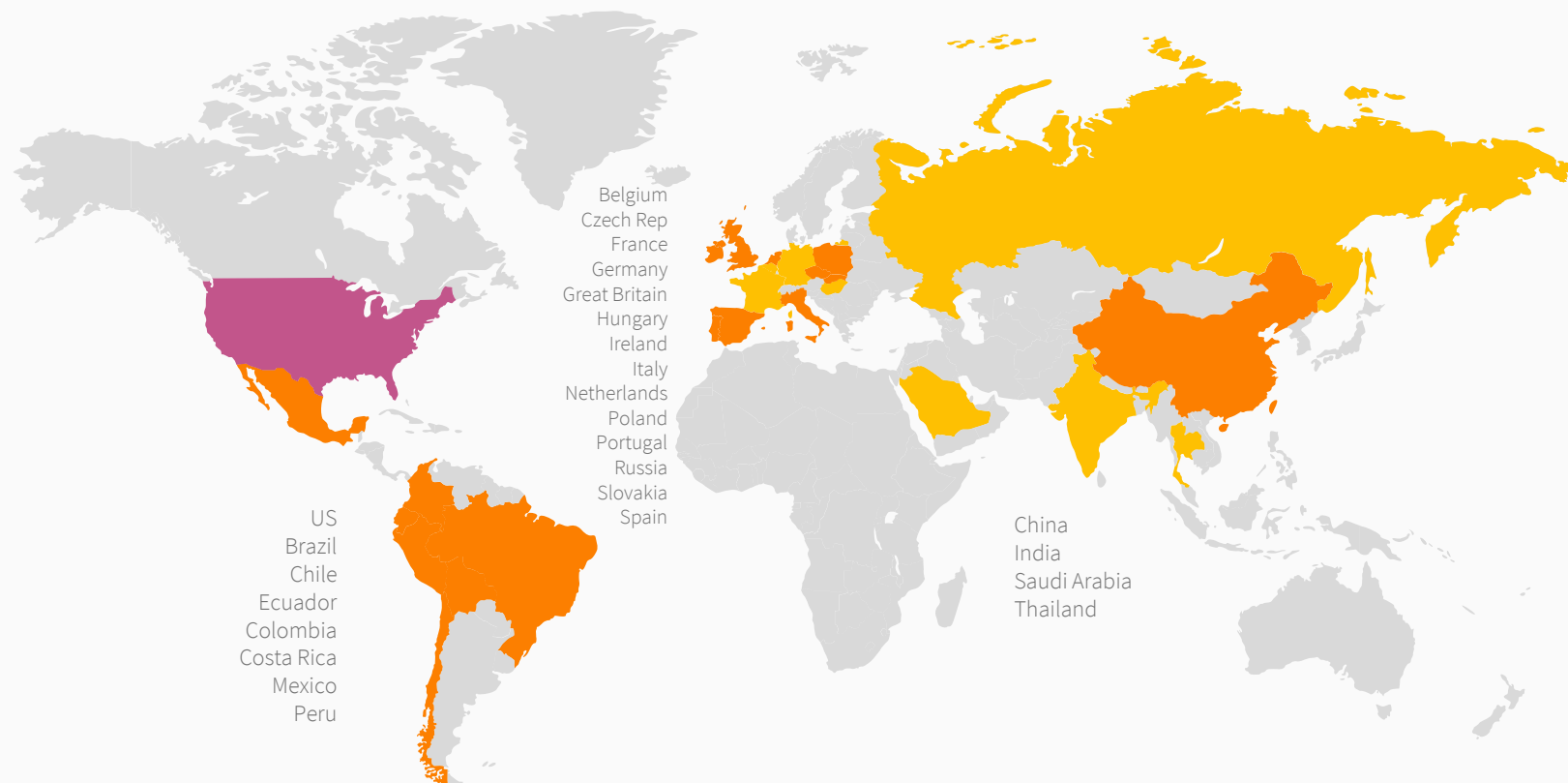
What issues most connect with shoppers and should be aligned to my brand

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 Economist

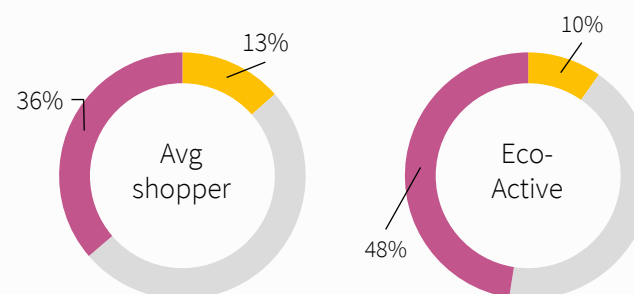
The impact of COVID-19 is all down to inequality

"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



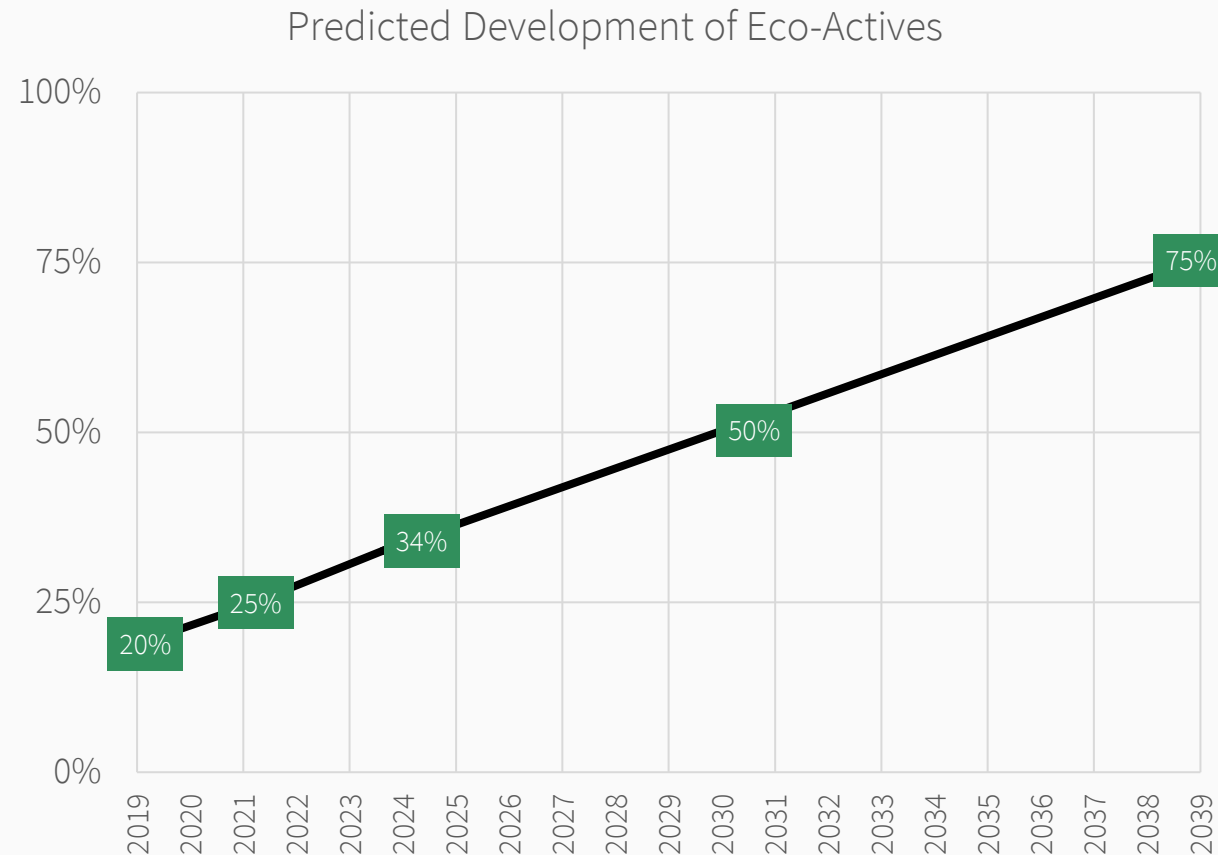
...resetting business strategy

"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

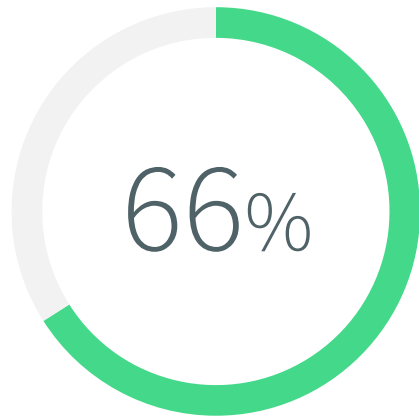
They are worried about the environment and plastic waste, at similar levels to Eco-Actives. But they are actually closer to Eco-Dismissers in how they act, not making many actions to reduce their waste. Their biggest barriers are convenience and price.

ECO DISMISSERS

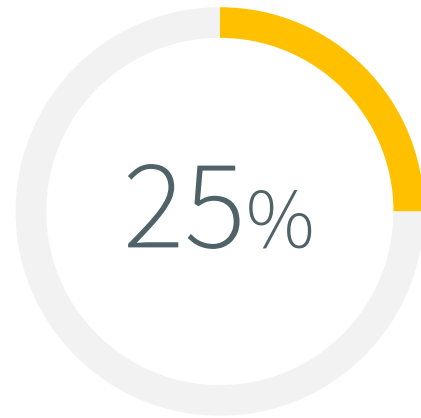
Shoppers who have little or no interest in the environment and making no steps to reduce waste. The topic rarely features amongst friends and family and they are lacking awareness of environmental concerns. They do not think they make a difference.

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



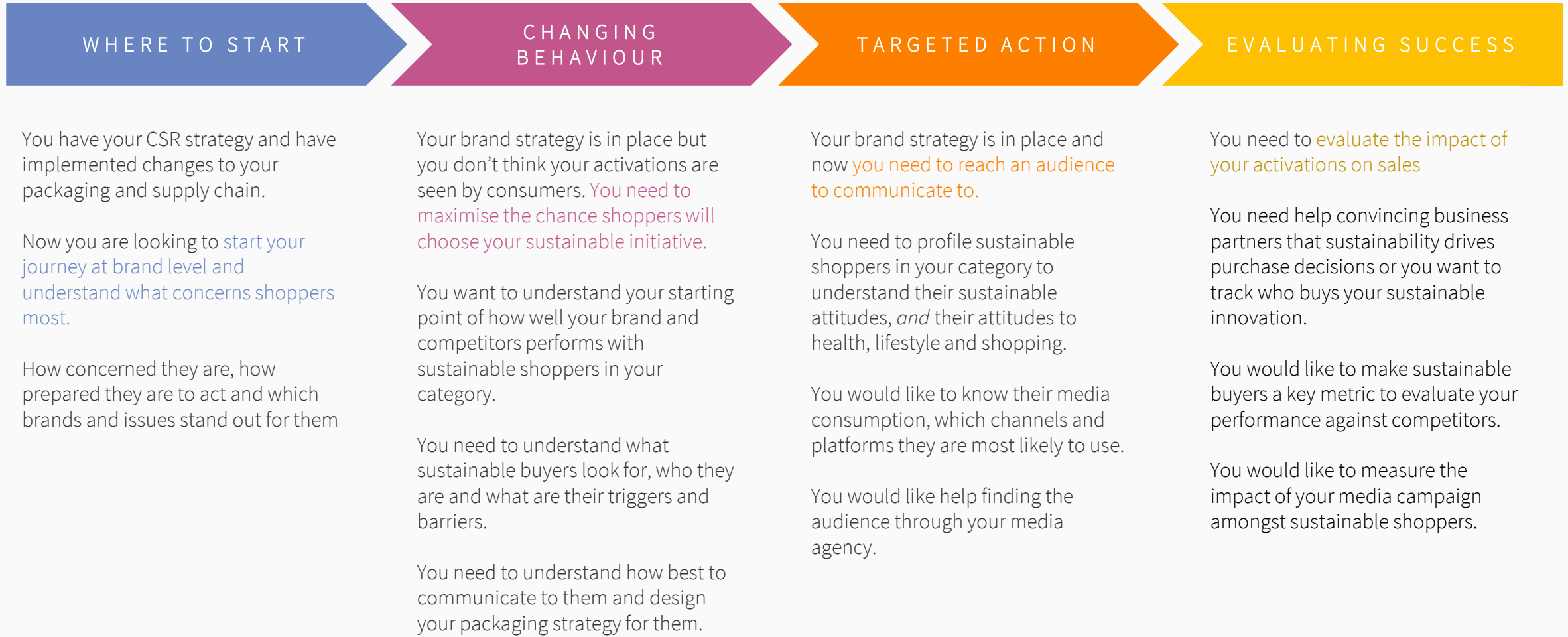
Value-Action gap worth
\$334bn
globally in FMCG

©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



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

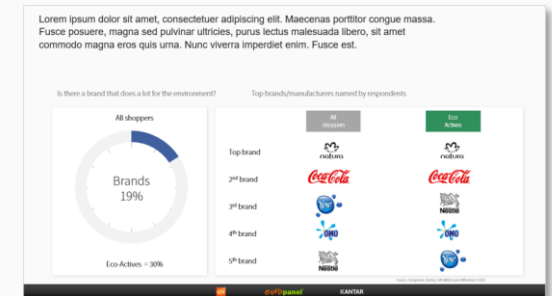
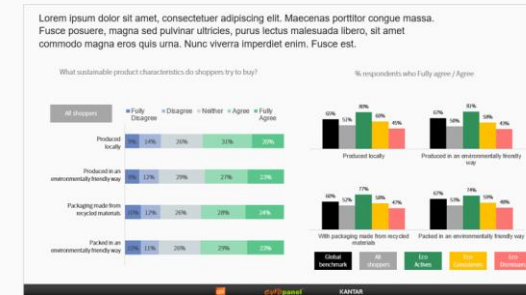
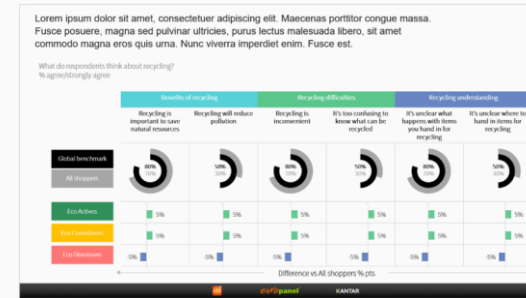
3. PACKAGING & RECYCLING

- 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

Example slides

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

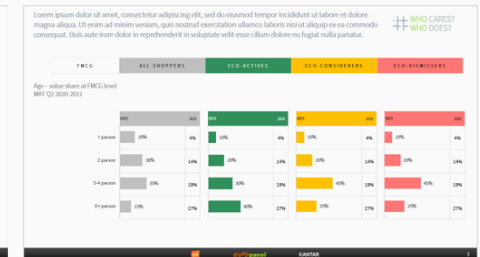
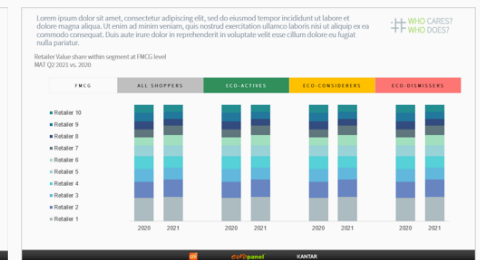
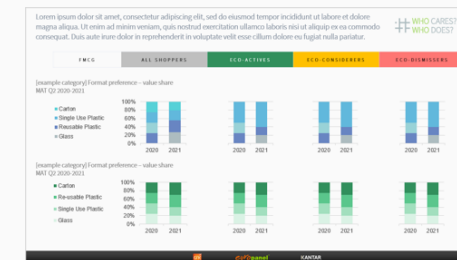
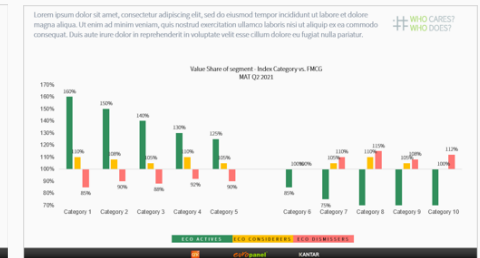
Notes:

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



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

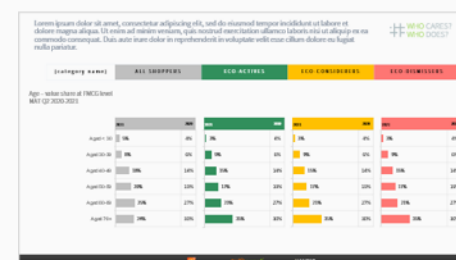
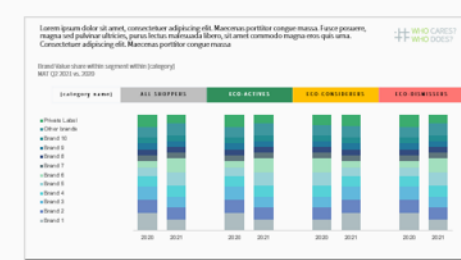
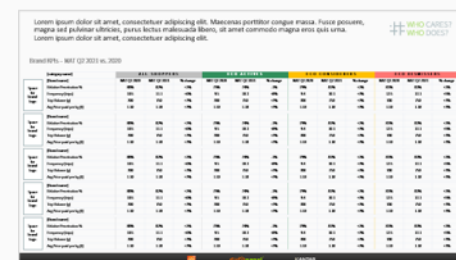
Notes:

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

WHO CARES?
WHO DOES?

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 €		