

**KANTAR**

Sustainability:  
does COVID-19  
mean it's time  
to rewrite the script?

Beth Shears and Mary Lumley


3<sup>rd</sup> December 2020

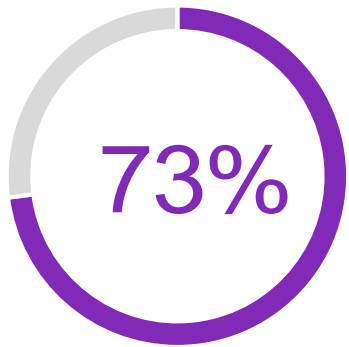


# The world is at an inflection point

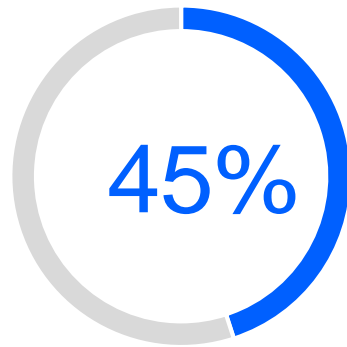


# COVID-19 has added to our sense of vulnerability

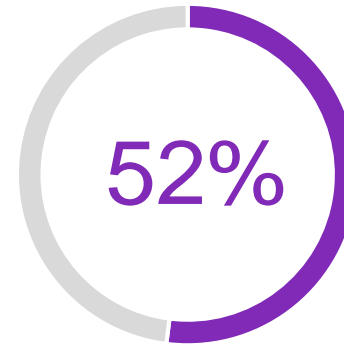
 **Income impact widely felt**




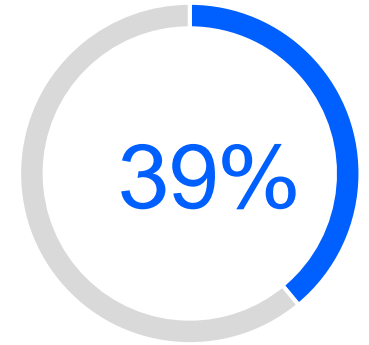
 **Employment impact felt**



 **We are scared about the situation**

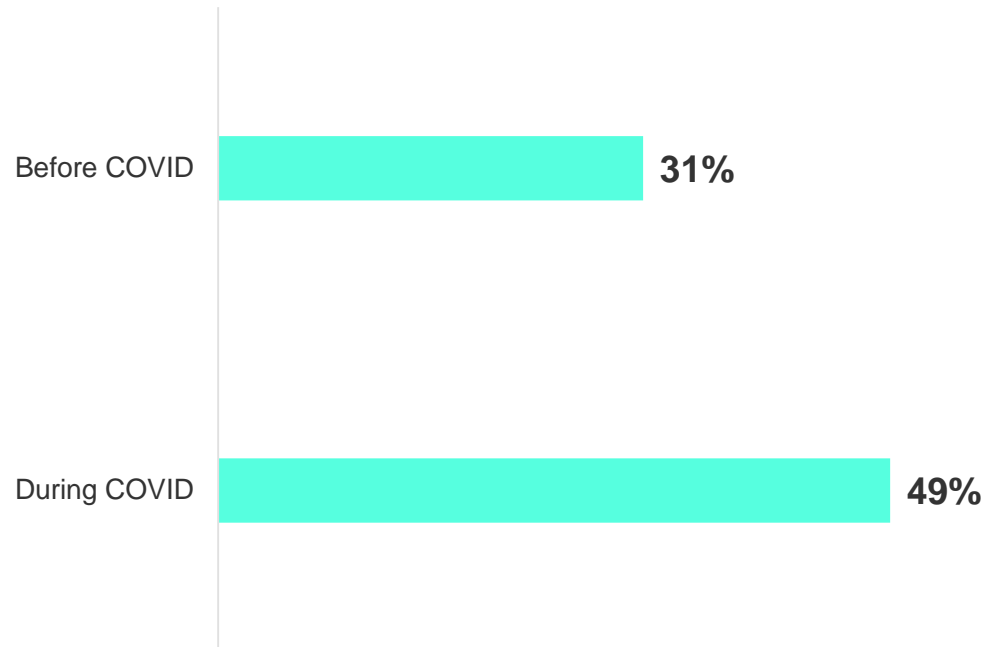


 **Our mental health is being impacted**

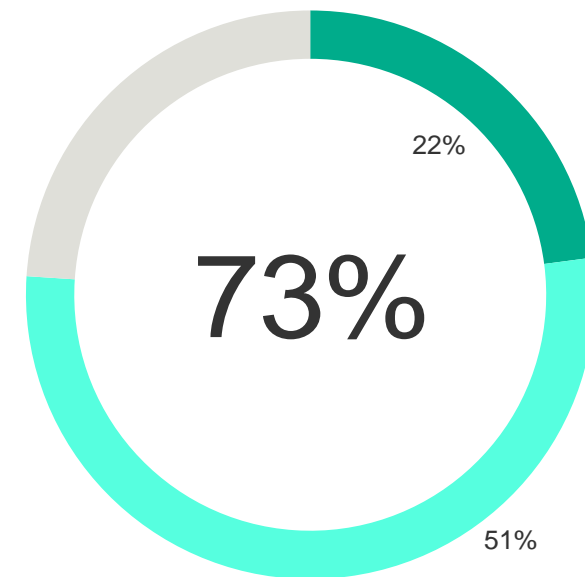


# Rather than putting sustainability on the backburner, COVID-19 has embedded sustainability as a core issue of public opinion

**'I prefer products and services that offer ways to offset their impact on the environment'**



**Has your opinion towards worrying about environmental issues changed because of COVID-19?**



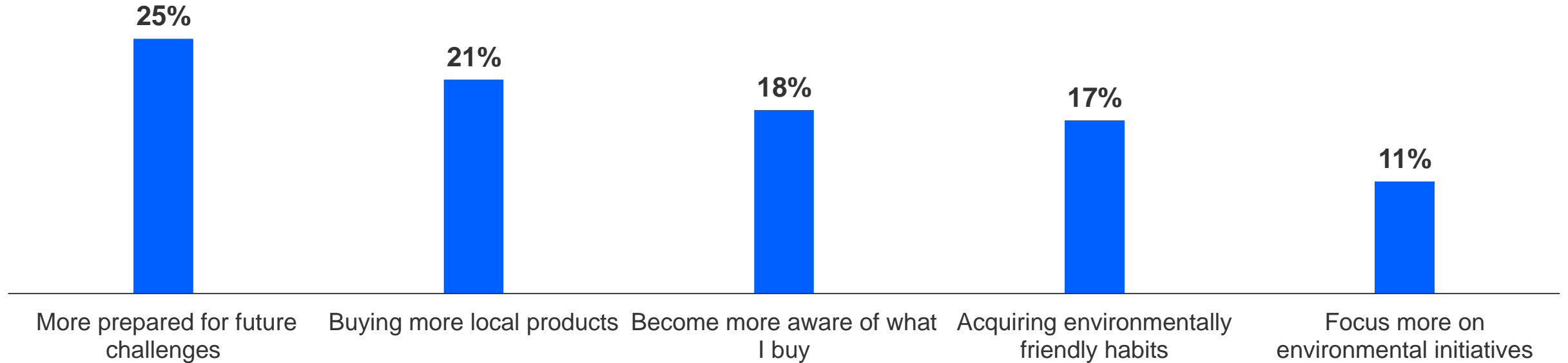
# COVID-19 has led us to re-assess our priorities



**63%**

Think consumer habits and behaviors will change

## Top 3 pandemic effect on how we think and behave (%)





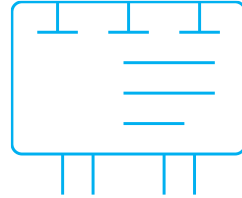
**But despite the engagement and desire to change, people can find this challenging**



# Consumer pockets are deep – but companies haven't been standing out



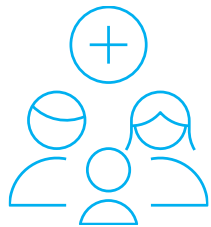
**41%** willing to spend more on sustainable products



**33%** say advertising which is focused on sustainability stands out



**80%** believe companies should be doing more to be sustainable



**37%** prefer brands who take a stance on social issues



**49%** say its important that companies go carbon negative



Only **22%** can name a brand that's doing a good job

# Both governments and companies are increasingly willing to help close the value-action gap

Businesses place sustainability as #1 strategic priority

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Build back better

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Innovation

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# Because the value it brings is undeniable

**\$382**  
billion

Spending power of the most sustainably engaged in the FMCG sector alone

**Kantar's  
#WhoCaresWhoDoes,  
2020**

**\$630**  
billion

In net material cost savings if circular economy adopted in manufacturing sectors

**Ellen McArthur  
Foundation, 2013**

**\$4.5**  
trillion

Projected economic yield of shifting towards a circular economy in the next decade

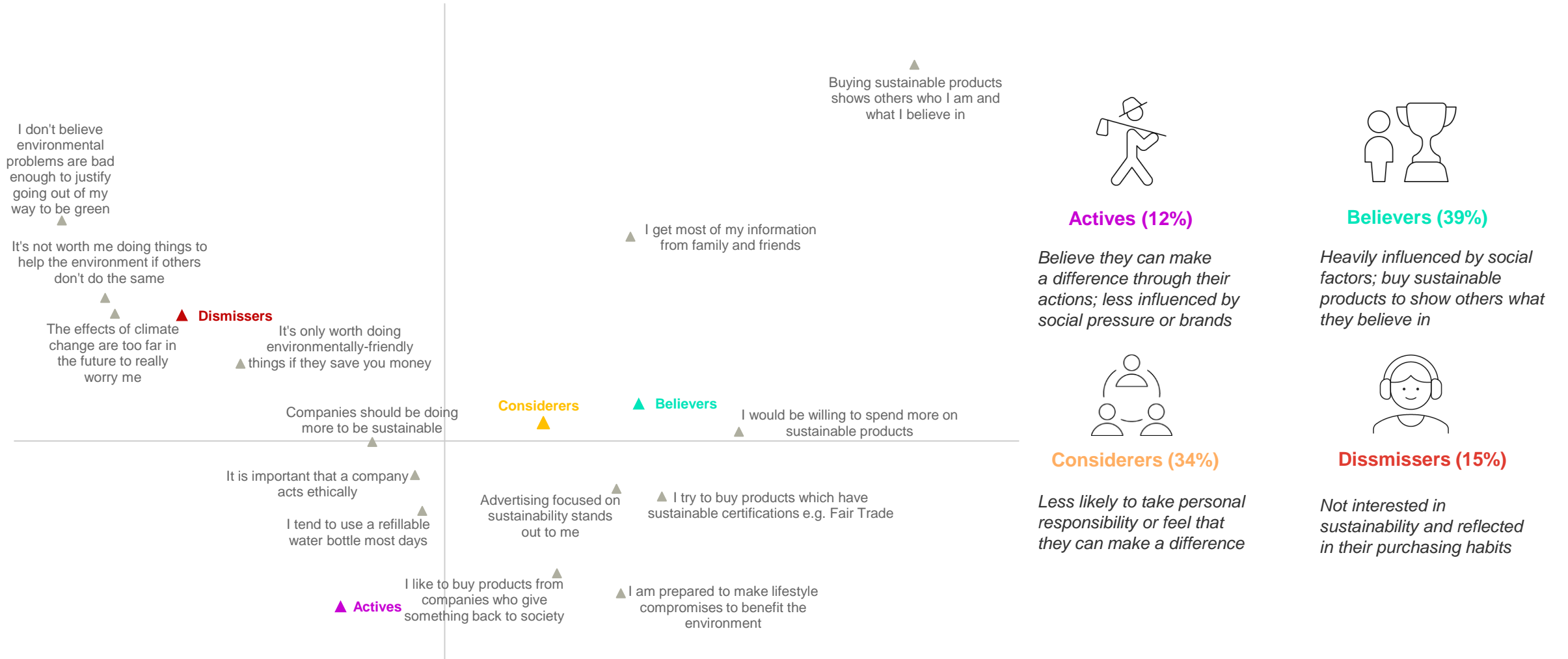
**World Economic  
Forum, 2019**



A young boy with curly hair, wearing a light blue t-shirt and dark shorts, is running barefoot on a sandy beach. He is holding a white toy airplane high above his head with his right hand. The background shows a wide expanse of sand and the ocean under a bright, hazy sky, suggesting a sunset or sunrise. The overall mood is joyful and active.

# Moving from understanding to action

# Actives are most likely to feel they can make a difference whilst Dismissers tend to believe the climate crisis isn't bad enough to change their behaviour

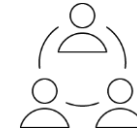




## Actives (12%)



## Believers (39%)



## Considerers (34%)



## Dismissers (15%)



### Demographics

59% female, 18+

56% female; younger demographic, most educated group

Oldest group; 27% are 65+  
Comfortable on present income

62% male, 25-64, least wealthy group



### Lifestyle

Like to be well informed, family orientated and future orientated, altruistic

Swayed by views of others, image conscious and status driven, reject responsibility

Most content and happy with life – more stoic and planned

Less optimistic, least outgoing and image conscious



### Impact of Covid?

Worried about future, 39% shopping more online; 1 in 4 shopping more locally

Most worried about future and value mental health more

Least worried about their future and least likely to be using social platforms more

Very unlikely to choose brands supporting people during COVID



### Brands/sectors interested in

health & wellness, family, cooking  
*Yeo Valley, Weetabix, Amazon*

fashion, cosmetics, health & beauty, home décor, technology  
*Nivea, H&M, Calvin Klein, Apple*

Gardening, national news  
*Baileys, Bounty, Famous Grouse*

computing, sport, music, convenience  
*Lynx, Jack Daniels, Premier League, Budweiser*



### Role for brands?

**Yes**

**Yes**

**Yes**

**Not yet**  
but 1 in 4 more concerned about sustainability



### Media Mix

Cinema, Live TV, VOD  
Newspapers and Magazines, gaming

Cinema, OOH, mobile internet, newspapers and magazines, VOD, online videos, gaming

Live TV, Direct Mail, Radio, magazines, newspapers

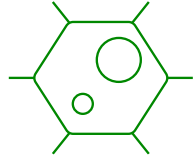
Internet, OOH, Live TV, VOD, gaming

# Key takeaways



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Environmental issues are increasingly coming closer to home



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Covid-19 has not put sustainability on the backburner – it's become more important to us



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We expect brands to step up and help us become more sustainable



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Opportunity to monetise the value-action gap if brands understand the variety of motivations in their audience

# Thank you

Get in touch with us to find out more:

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