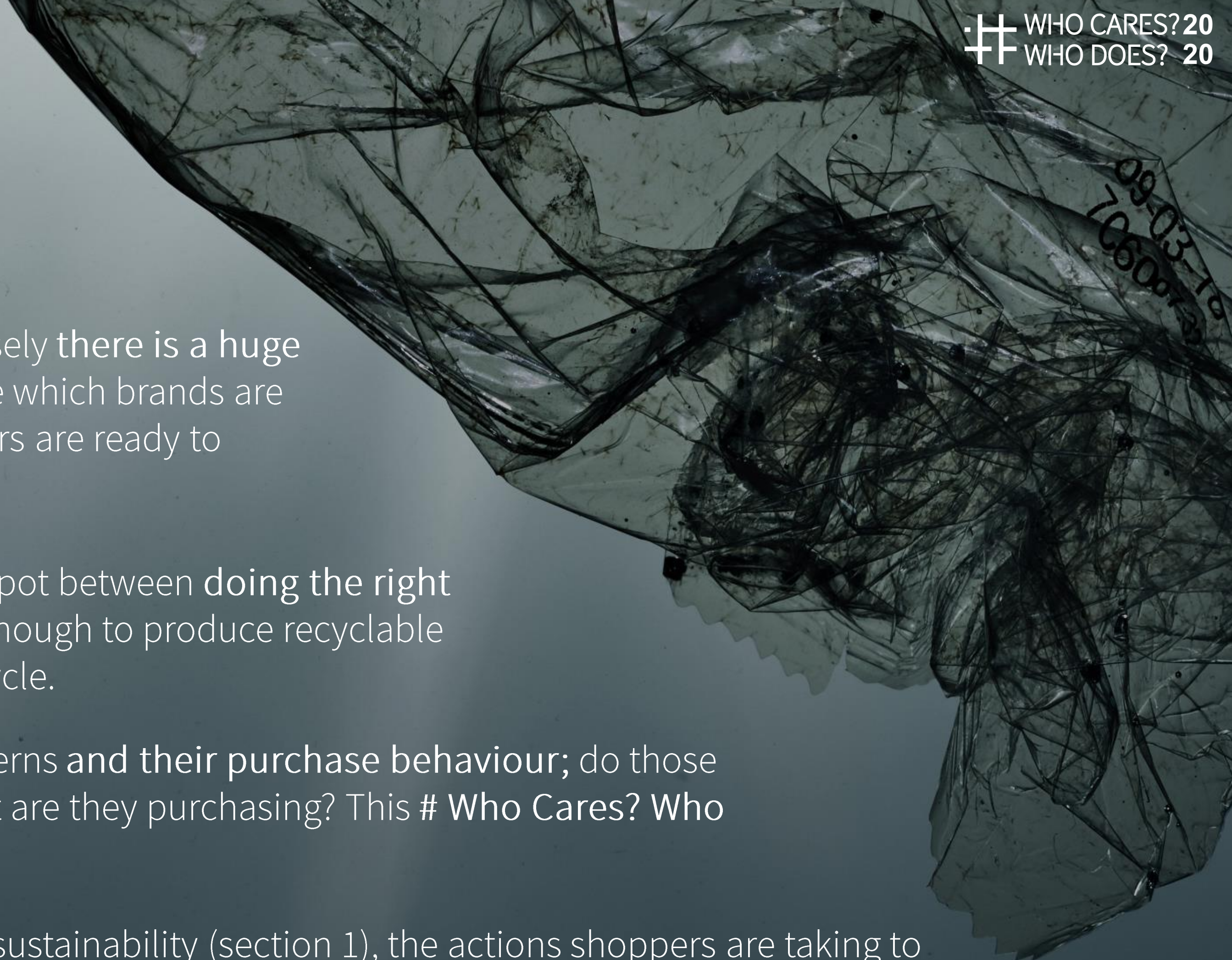
WHO CARES? 20
WHO DOES? 20

Sustainability concern and action
…What's changed since last year?

Who Cares? Who Does?



Sustainability is a huge opportunity for businesses, and conversely **there is a huge risk for inactivity**. Across the globe shoppers are able to recognise which brands are active in reducing their adverse environmental impact and shoppers are ready to drop those with too big an impact from their repertoires.

The challenge for manufacturers and retailers is to find the sweet spot between **doing the right thing and driving shoppers to your brand**; for example it is not enough to produce recyclable packaging if shoppers do not purchase or do not know how to recycle.

The key to achieving these dual aims is identifying consumer concerns **and their purchase behaviour**; do those that care about the environment purchase your brand? If not, what are they purchasing? This **# Who Cares? Who Does? report** will do this for you.

In this report you'll get a detailed understanding of perceptions of sustainability (section 1), the actions shoppers are taking to be more environmentally friendly (section 2), and the actions they expect from manufacturers (section 3). In section 4 and 5 we will link the survey to our purchase panel data so you can **directly see** the impact of environmental concern on brands chosen and product formats purchased at a macro level and for your category(s).

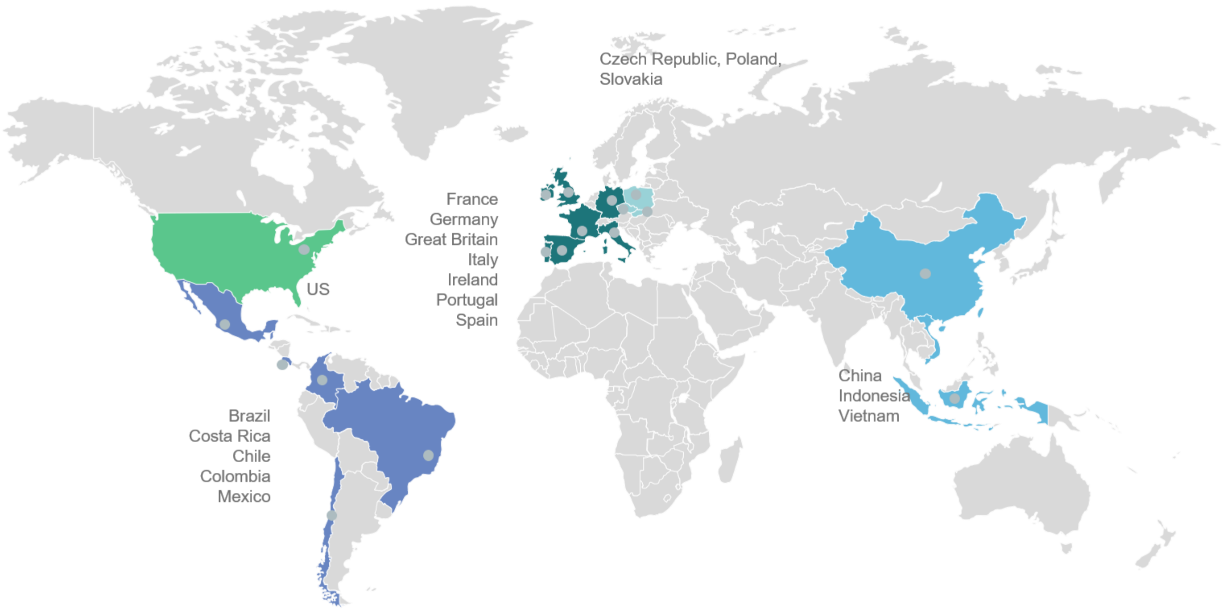
The findings are split into three segments based on level of personal actions to reduce plastic waste: Eco-Actives are making most actions, Eco-Considerers who are concerned but less active, and Eco-Dismissers making little or no actions at all.

Agenda

Methodology

WHO CARES? 2020
WHO DOES? 2020

Harmonised survey across 19 markets reaching 70,000 households



Report contains region or global benchmark based on aggregation of all countries, where each is treated equally

Great Britain

BENCHMARK	Global x24 countries
QUESTIONNAIRE	Survey within Kantar Consumer Panel Questionnaire length approx. 10 minutes with open and closed questions
ECO-SEGMENTS	3x Eco-segments – based on number of actions shoppers personally make to reduce plastic waste
SAMPLE	Main shopper within 8,000 households. Representative of population with respect to education, age, and region. 18+
FIELD	June 2020 Comparisons with Jun 2019 Online
CATEGORY(S)	[example] Coffee (Ground, Filter, Capsules)

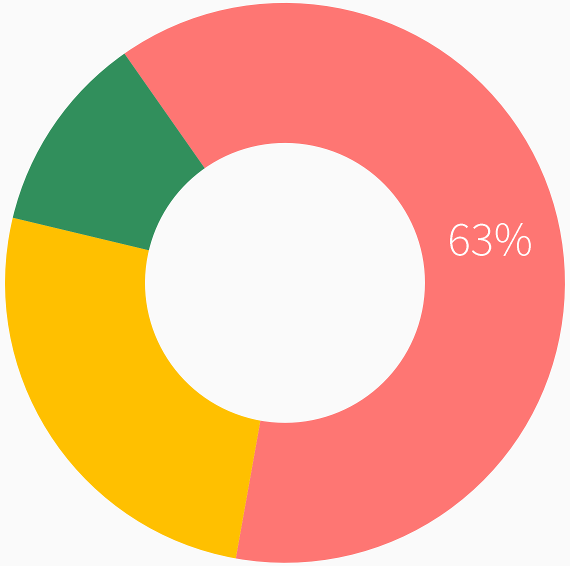
Meet our Eco-Segments in …

Eco Actives

Shoppers who are concerned about plastic waste and are making significant steps to reduce their waste. They feel a responsibility to reduce waste and know which companies have a genuine environmental concern.

Eco Considerers

Shoppers who are worried about plastic waste, but it is not their chief driver of choice. They are making occasional steps to reduce their waste but place the emphasis for action on companies and governments.



% of shoppers
In…, 2020

Eco Dismissers

-5%pts

Shoppers who have no interest in plastic waste challenges and are making no steps to reduce waste. The topic is unlikely to feature amongst friends and family and they are lacking awareness of environmental concerns

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

What does sustainability mean for shoppers?

Included in this section:

- Most concerning environmental challenges
- What does sustainability mean to shoppers?
- Does the outlook look positive?

Example

Text

What does sustainability mean for shoppers?

Biggest global environmental concerns
% respondents including issue in their top 3 concerns

Top 5 issues	GB All shoppers	2020	2019	GB Eco Actives	2020	2019	GB Eco Considerers	2020	2019	GB Eco Dismissers	2020	2019
1	Plastic Waste	50%	50%	Plastic Waste	50%	50%	Plastic Waste	50%	50%	Extinction of species	50%	50%
2	Climate Change	40%	40%	Air pollution	40%	40%	Air pollution	40%	40%	Food safety	40%	40%
3	Food Waste	30%	30%	Ozone layer hole	30%	30%	Ozone layer hole	30%	30%	Waste of water	30%	30%
4	Water Pollution	20%	20%	Climate change	20%	20%	Food Safety	20%	20%	Water pollution	20%	20%
5	Water Waste	10%	10%	Insecticides	10%	10%	Climate change	10%	10%	Waste of food	10%	10%

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

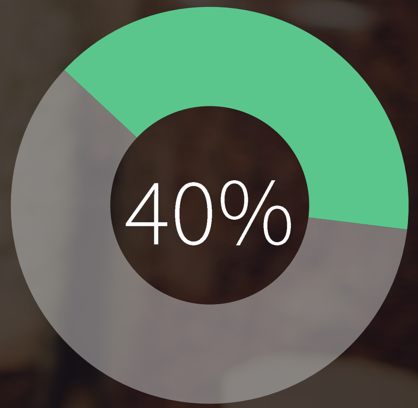
2. Actions shoppers take

Included in this section:

- Actions taken to reduce plastic waste
- Lifestyle changes made since last year
- Recycling – attitudes and challenges

Example

Few shoppers can avoid buying plastic packaging – even the most environmentally conscious



Avoiding buying plastic packaging when shopping
(% agree/fully agree – Eco-Actives GB)

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

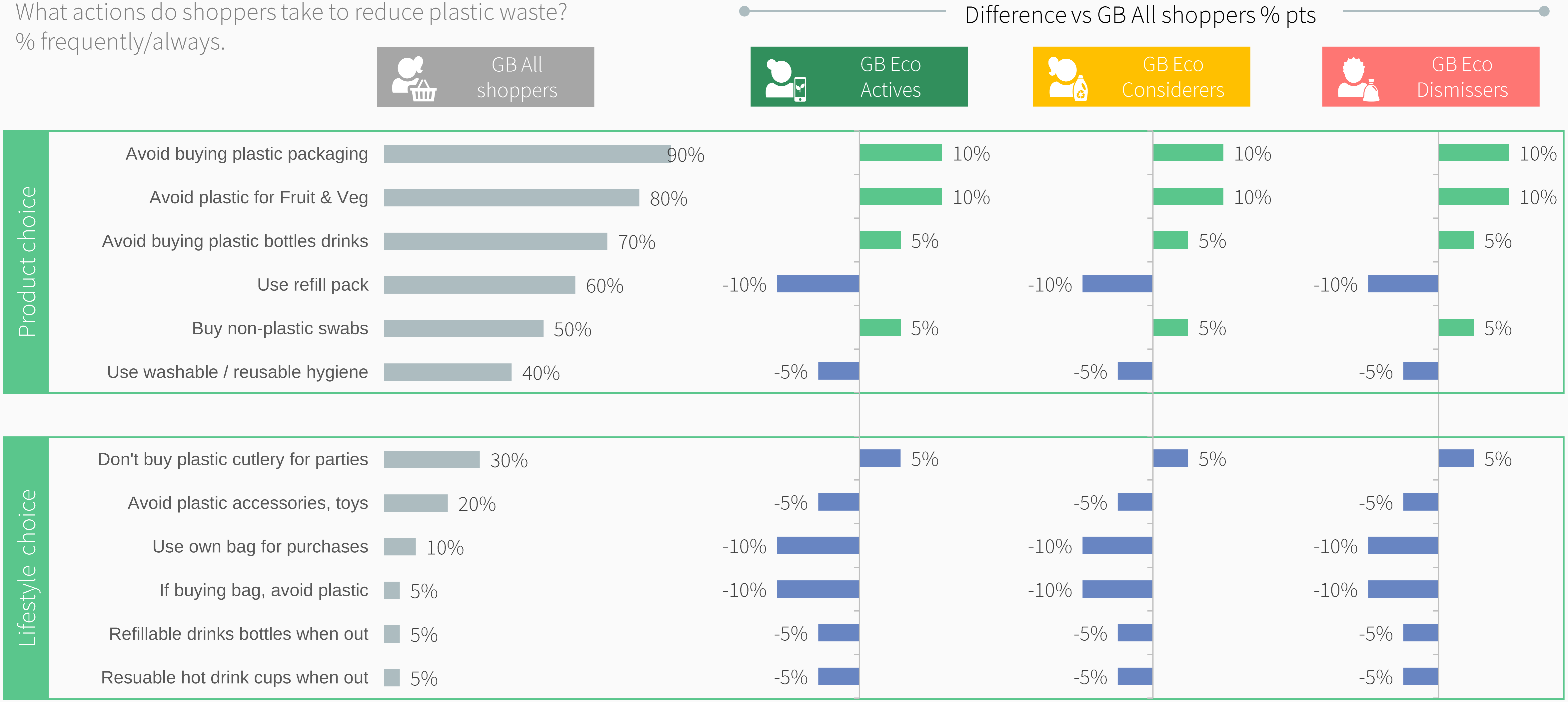
Example

Text

WHO CARES? 2020
WHO DOES? 2020

Actions shoppers take

What actions do shoppers take to reduce plastic waste?
% frequently/always.



See appendix for full description of each action from questionnaire

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

Example

Text

Actions shoppers take

What actions do shoppers take to reduce plastic waste?
Filled circle - actions which more than half of shoppers are doing frequently / always.

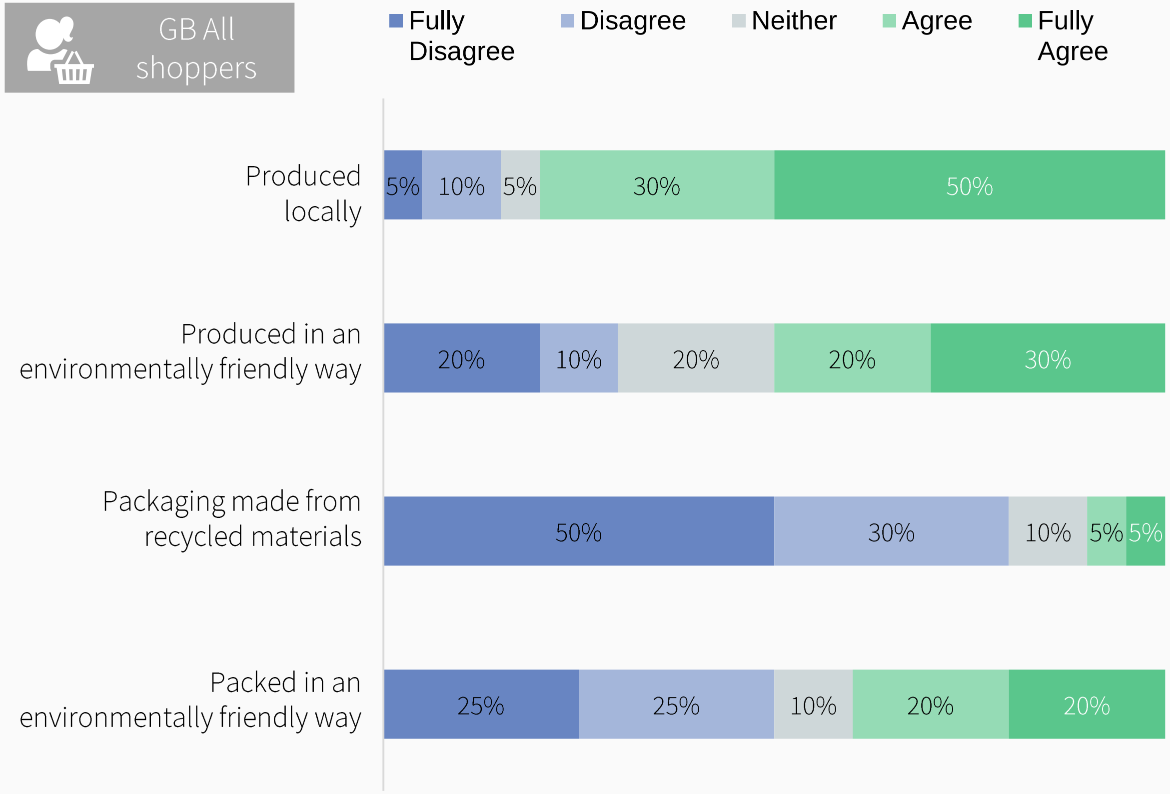
See appendix for full description of each action from questionnaire

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

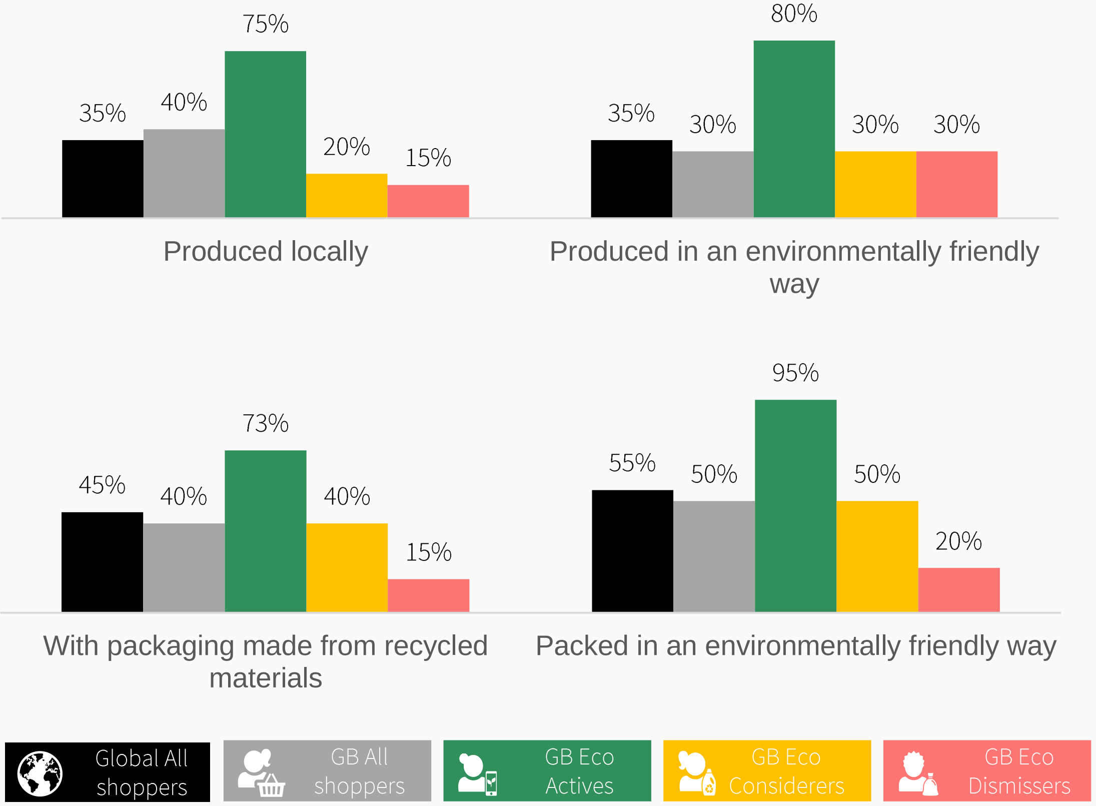
Example

Text

What sustainable product characteristics do shoppers try to buy?



% respondents who Fully agree / Agree



3. How should businesses act?

Included in this section:

- Who is responsible for limiting environmental impact?
- Which brands and retailers stand out?
- Which categories can make most difference to sustainability?
- What solutions are expected of companies?
- Who influences shoppers?

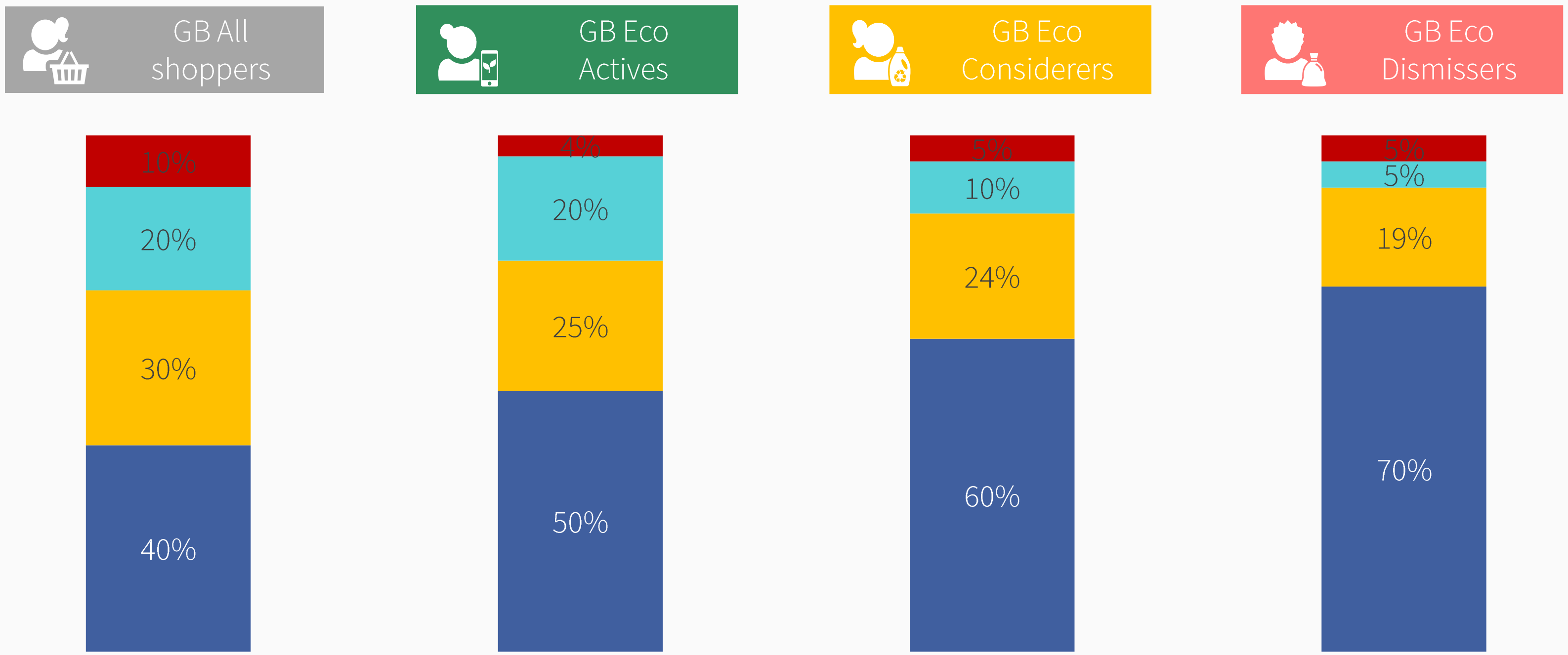
[TEXT TEXT]

Example

WHO CARES? 2020
WHO DOES? 2020

How should business act?

Who shoppers think can make the biggest difference to control and limit environmental damage
% top rank



[biggest %] of shoppers think [insert biggest] could make the biggest difference to control and limit environmental damage?

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

GfK europanel KANTAR

[text text]

Example

Solutions to reduce the environmental impact of grocery shopping
GB all shoppers. % yes

All GB shoppers	Fresh foods, like fruit, vegetables, dairy, meat, bread	Dry (rice, pasta) and frozen foods	Snacking (like chocolate, crisps)	Beverages (tea, coffee, colas, drinks)	Personal Care (like shampoo, skincare)	Home care (like detergents or cleaners)
Packaging changes						
Products packed in other material than plastic	55%	55%	55%	55%	55%	55%
Packaging that is free from single-use plastic	55%	55%	55%	55%	55%	55%
Products in packaging that is bio-degradable	55%	55%	55%	55%	55%	55%
Products in packaging that can be 100% recycled	55%	55%	55%	55%	55%	55%
Lighter weight packaging	55%	55%	55%	55%	55%	55%
Product change						
Products that use less water	25%	25%	25%	25%	25%	25%
System change						
Deposit systems for empty packages	25%	25%	25%	25%	25%	25%
Refill systems or bring own containers to the store	10%	10%	10%	10%	10%	10%
Availability						
More availability of local products	1%	1%	1%	1%	1%	1%
More availability of carbon neutral products	2%	2%	2%	2%	2%	2%
More availability of organic products	3%	3%	3%	3%	3%	3%

How should business act?

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

4. Eco-segments behaviour

Included in this section:

- Segment share and how it's changed vs last year
- What differentiates segments?
- Attitudes to Naturalness
- Demographic profile
- Macro shopping behaviour
- Covid-19 behaviour

[text text]

Eco Actives

Shoppers who are concerned about plastic waste and are making significant steps to reduce their waste. They feel a responsibility to reduce waste and know which companies have a genuine environmental concern.

Eco Considerers

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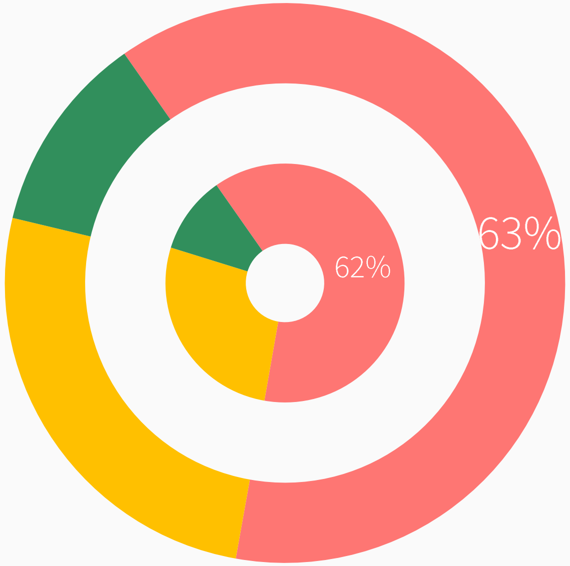


% of shoppers
Outer …, 2020
Inner – Global, 2020

Eco Dismissers

Shoppers who have no interest in plastic waste challenges and are making no steps to reduce waste. The topic is unlikely to feature amongst friends and family and are lacking awareness of environmental concerns

Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

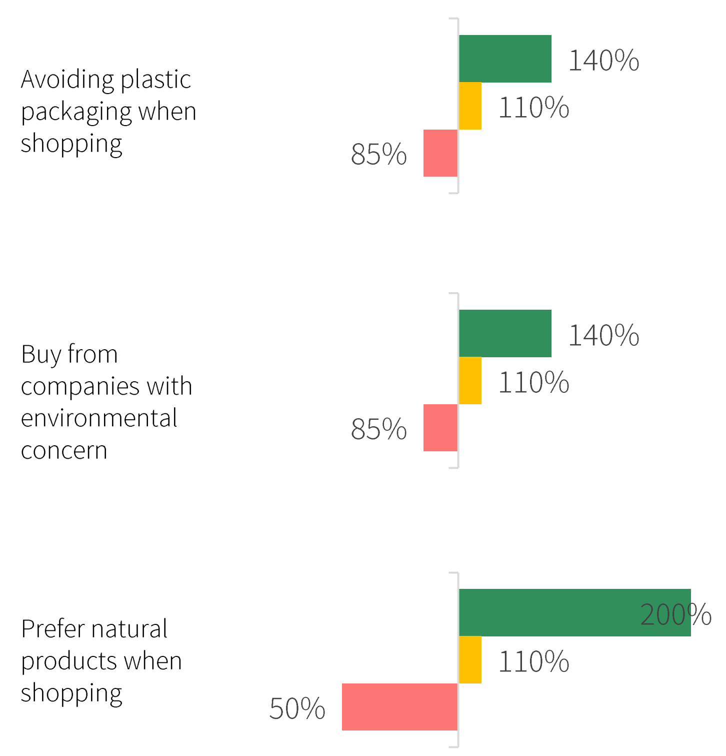
WHO CARES? 2020 WHO DOES? 2020

Eco-Segments

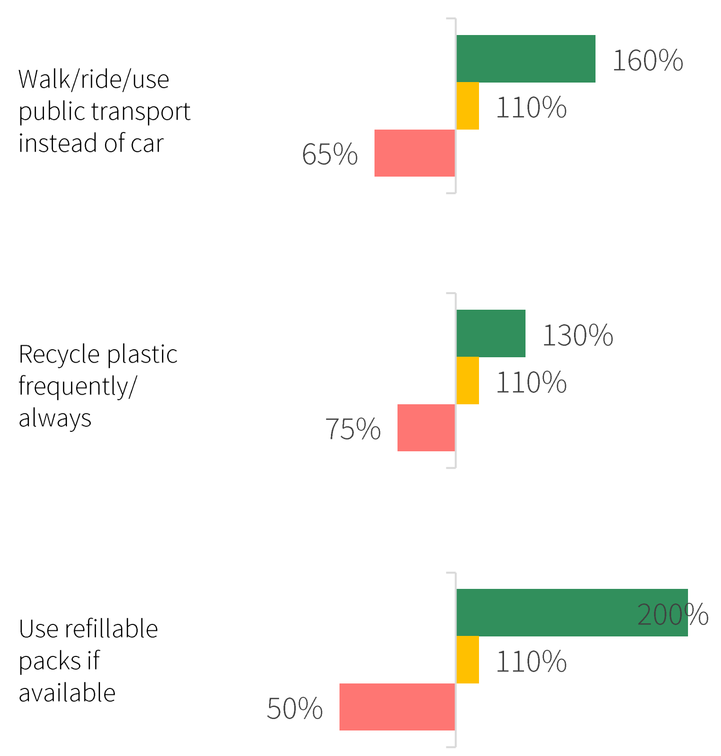
What differentiates our shopper segments?
Index vs. all shoppers.

GB Eco Actives | GB Eco Considerers | GB Eco Dismissers

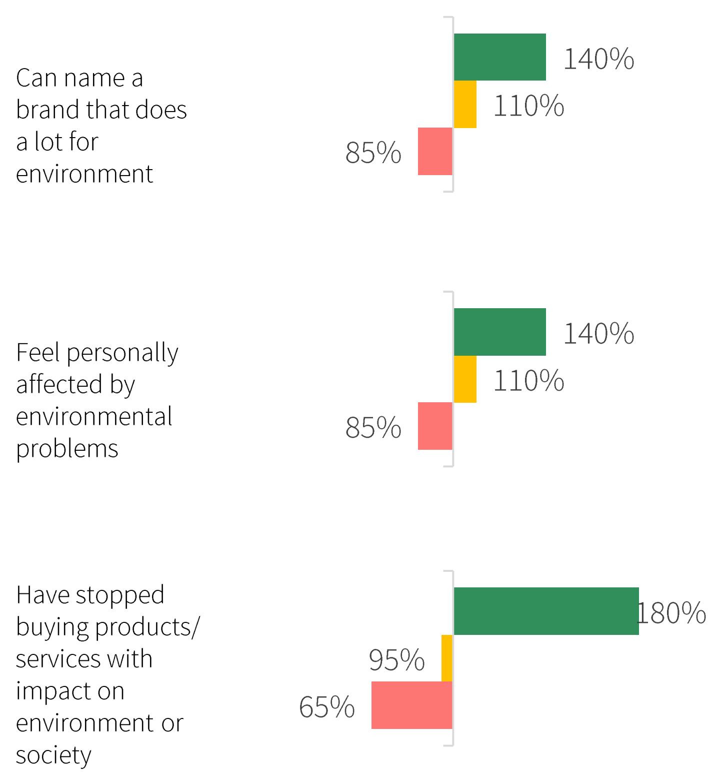
Claimed Shopping Preferences



Actions taken



Awareness



Source: Europanel, Kantar, GfK #WhoCares?WhoDoes? 2020

Text
Text

WHO CARES? WHO DOES? 2020

Purchase KPIs
2020, change vs. 2019

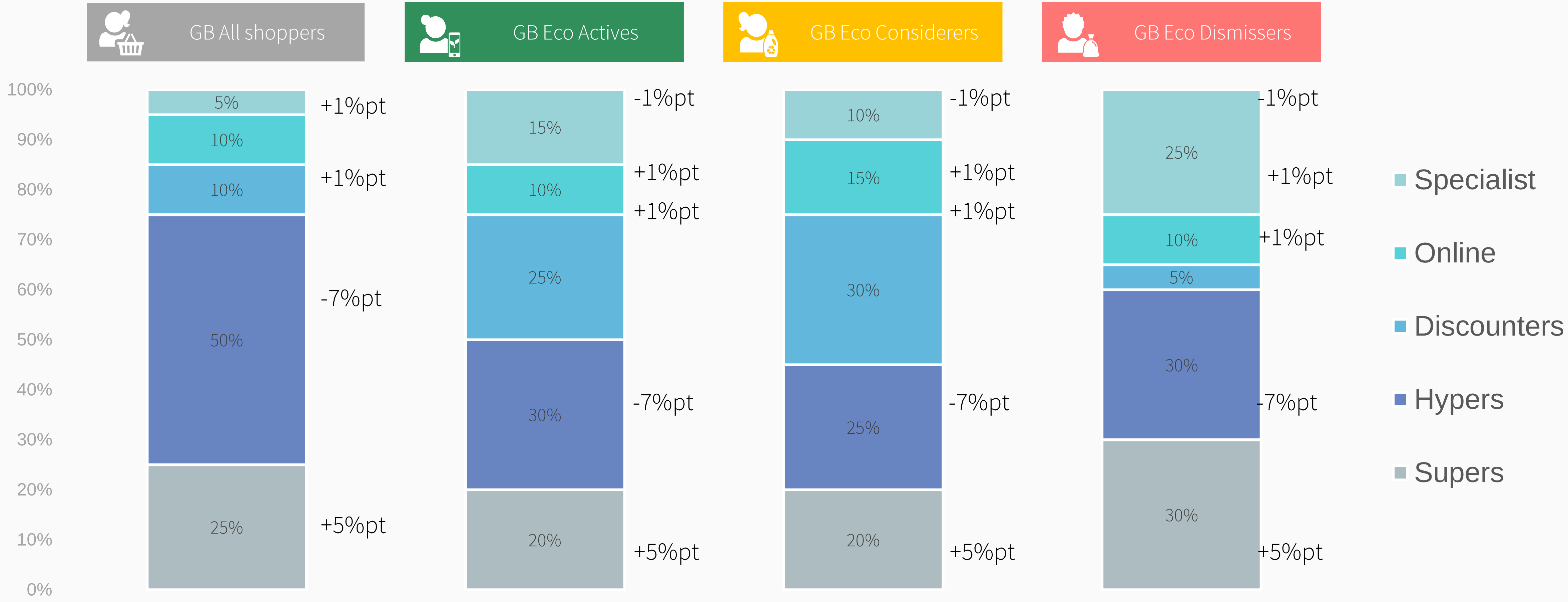
	GB All shoppers		GB Eco Actives		GB Eco Considerers		GB Eco Dismissers	
	2020	Change vs. 2019	2020	Change vs. 2019	2020	Change vs. 2019	2020	Change vs. 2019
Population share	100%		35%	+3%pt	45%	+3%pt	20%	+3%pt
Value share	100%		37%	+2%pt	43%	+2%pt	20%	+2%pt
Packs share	100%		45%	+1%pt	35%	+1%pt	20%	+1%pt
Average basket size	€35.45	+€0.91	€25.21	+€0.91	€45.34	+€0.91	€67.04	+€0.91
Trips per year	155	+5 trips	125	+5 trips	175	+5 trips	201	+5 trips

Eco-Segments

Text
Text

WHO CARES? 20
WHO DOES? 20

Total FMCG Value share, (change vs. PY)



Eco-Segments

5. How the Eco-Segments shop in [category]

Included in this section:

- Segment KPIs
- Brand share
- Retailer share
- Format share
- Demographic Profile
- Covid-19 behaviour

Text
Text

WHO CARES? WHO DOES? 2020

[Category] KPIs

		GB All shoppers		GB Eco Actives		GB Eco Considerers		GB Eco Dismissers	
		2020	Vs. 2019	2020	Vs. 2019	2020	Vs. 2019	2020	Vs. 2019
Category	Value share	100%	-2%pt	37%	+2%pt	43%	+2%pt	20%	+2%pt
	Volume share	100%	-2%pt	45%	+1%pt	35%	+1%pt	20%	+1%pt
	Rel. Penetration	55%	-2%pt	45%	+3%pt	65%	-3%pt	75%	-5%pt
	Spend per buyer	€15.45	+€0.91	€5.21	+€0.91	€25.34	+€0.91	€17.04	+€0.91
	Frequency	15	+1 trips	10	+5 trips	17	+5 trips	15	+5 trips
Your brand x1	Value share	100%	-2%pt	37%	+2%pt	43%	+2%pt	20%	+2%pt
	Volume share	100%	-2%pt	45%	+1%pt	35%	+1%pt	20%	+1%pt
	Rel. Penetration	15%	-2%pt	5%	+3%pt	15%	-3%pt	13%	-5%pt
	Spend per buyer	€5.45	+€0.91	€2.21	+€0.91	€7.34	+€0.91	€6.04	+€0.91
	Frequency	3	+1 trips	1	+5 trips	7	+5 trips	5	+5 trips
	Loyalty	20%	-2%pt	10%	-2%pt	41%	-2%pt	33%	-2%pt

Eco-Segments in [Category]

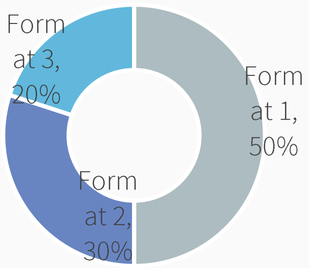
Text
Text

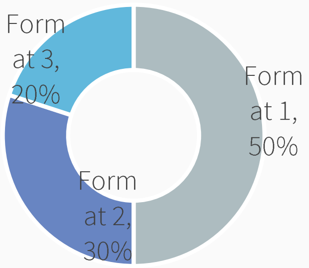
WHO CARES? 2020
WHO DOES? 2020

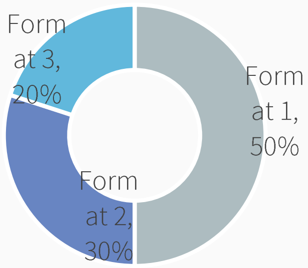
[Category]
Format Value share

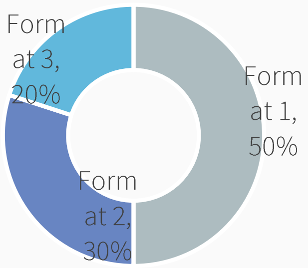
	GB All shoppers	GB Eco Actives	GB Eco Considerers	GB Eco Dismissers

2020

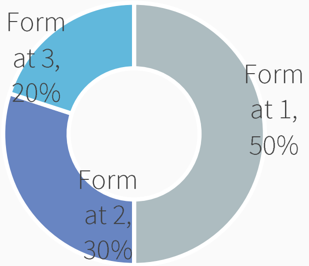


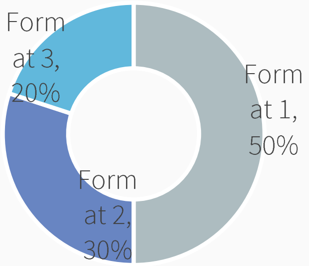


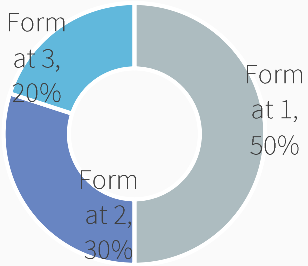


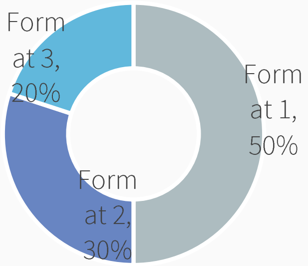


2019









Loren Ipsum

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