



Sustainability: The European Story

Exploring what sustainability means to consumers and how brands can navigate their journey

Sustainability is a subject of “opposing forces” but the commercial case is clear

And there are trillions of dollars of potential revenue sitting in untapped opportunities

\$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

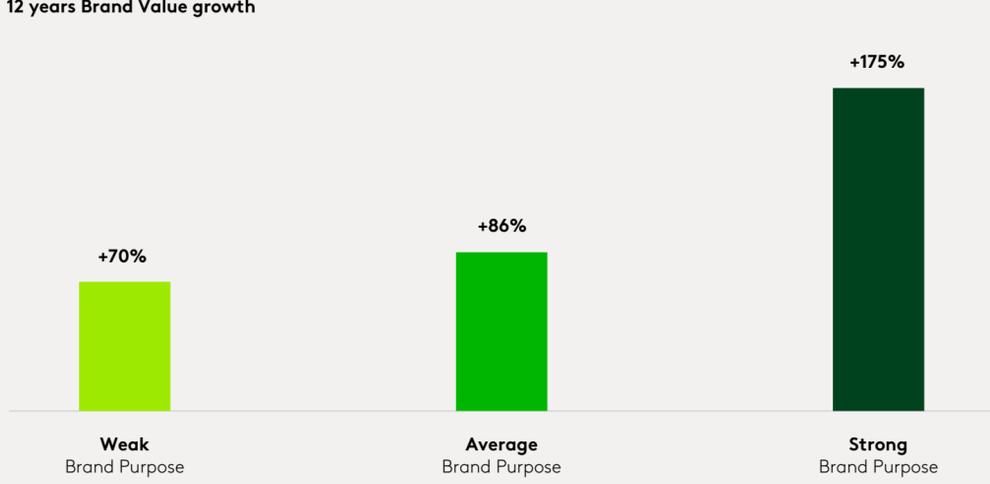
\$12 trillion

In four key economic areas by 2030

Better Business, Better World WBCSD, 2017

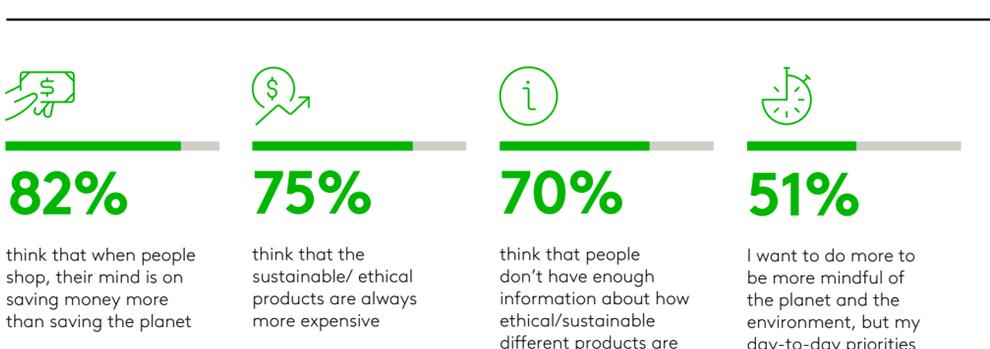
Progressive purposeful businesses reap bigger commercial rewards

12 years Brand Value growth



BRANDZ™ Top 100 Most Valuable Global Brands: 94 common brands. Appearing in the Top 100 in all years from 2006 - 2018

Consumers will not be leading the transformation. It's not on them!

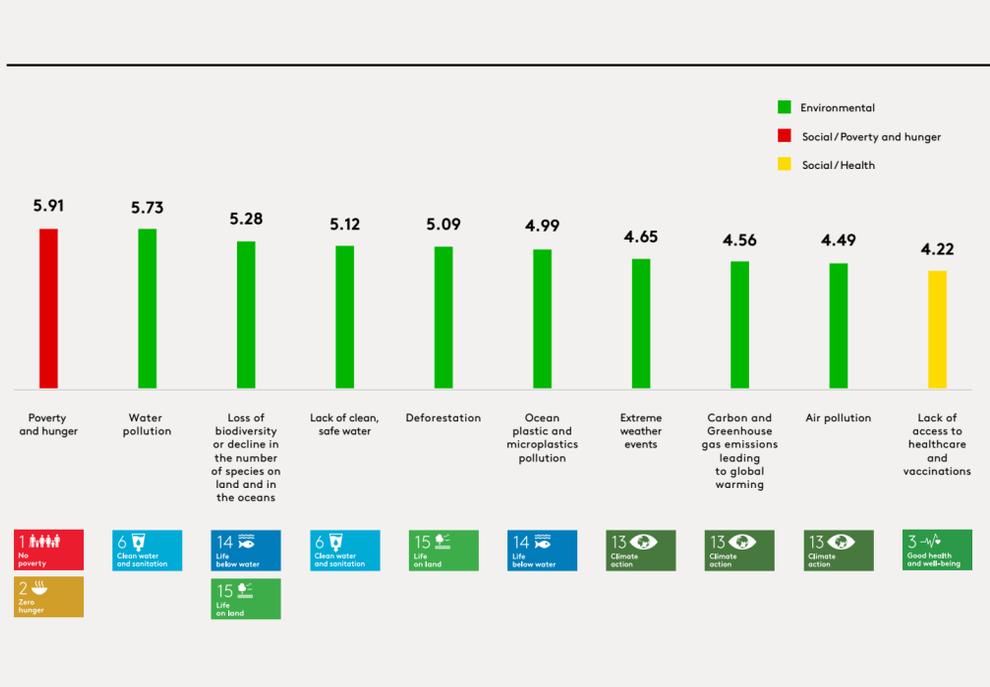


It's on us...

Businesses and brands need to (and are expected to) take leadership



Overall, key concerns overwhelmingly linked to the environment



SUSTAINABLE GOALS

To activate successful sustainable transformation strategies you need to apply these 5 key building blocks

Applying the 5 key building blocks

- Identify the social and environmental issues relevant to your sector, WHERE you have the right to play
- Think about the role you can uniquely play based on the anchor of your brand purpose – your WHAT
- Understand WHO to go after and what different levers will be effective for differing engagement levels
- Plan HOW the interventions will help people address the behavioural barriers that prevent people from living up to their values and beliefs
- DO - ongoing committed action is required

