

#Who Cares? Who Does?

Five years of linking
sustainability views
and actions to real
household purchasing





Benefits

Helping multinationals, local manufacturers and retailers understand opportunities in sustainability

Who Cares? Who Does?

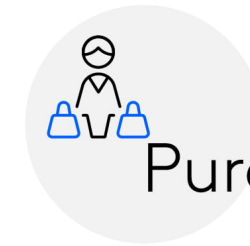
Can help you quantify your opportunity and understand how to target eco consumers better



Our largest ever view on attitudes to sustainable product choices and actions to reduce waste providing globally consistent and robust data for 35 countries across 4 continents and over 112,000 respondents.



Our unique segmentation is based on everyday actions rather than intention. We can track engagement five years and compare between countries. Our Eco Actives show distinct shopping behaviour and are worth \$456bn to FMCG.



Leveraging the purchase panel is the only way to directly connect attitudes to real brand purchasing. This study enables you to understand your brand performance, opportunity size and competition with accurate penetration and deep product detail





Our Eco segmentation



Eco Actives

- Highly concerned about the environment and plastic waste.
- Taking the most actions to reduce their waste.
- They feel an intrinsic responsibility to be more sustainable, follow the topic more actively and have a greater awareness.
- Consistently buy brands and categories without plastic. packaging, local, natural ingredients, meat free and fresh.



Eco Considerers

- Worried about the environment and plastic waste.
- Not taking many actions to reduce their waste.
- Their biggest barriers are convenience and price.
- Interested in products with healthy ingredients and recyclable packaging.



Eco Dismissers

- Shoppers who have little or no interest in the environment and making no steps to reduce waste.
- They do not think they make a difference.
- The topic rarely features amongst friends and family and they are lacking awareness of environmental concerns.
- More likely to be young and with families therefore many of the key brands are lower tier or aimed at children.



Purchase link

Develop a detailed picture of behaviours,
plus the context and the needs driving purchasing decisions.



Are your brands winning with Eco Actives?

65%

of our brands fail to reach the most sustainable shoppers



Brands that under-index with Eco-Actives
(44/68 brands in FR, ES, DE)

Reaching our fair share of Eco-Actives would be worth...



24.5m
extra buyers/yr



185m
extra buyers/yr

Dummy data example for Manufacturer A



Questions we can answer

- **Who** are they?
- **What** do they care about?
- **How** important are they to your brand?
- **How** do they shop?
- **What** do they buy?
- **Where** do they shop?
- **Fresh packaging** preferences?
- **How much** do they spend?
- **Are they** buying more than last year?



How do we do it

#WCWD is a global survey in partnership with GfK and Europanel on our household purchase panels

Argentina, Austria, Belgium, Brazil, Canada, Chile, Chinese Mainland, Colombia, Costa Rica, Czech Republic, Denmark, France, Germany, Great Britain, Hungary, India, Indonesia, Ireland, Italy, Kenya, Mexico, Netherlands, Nigeria, Peru, Poland, Portugal, Romania, Saudi Arabia, Slovakia, Spain, South Africa, South Korea, Sweden, the US, and Vietnam.



Our Offer

Country Level reports

Get an in-depth summary on the attitudes and marketing sizing of your country overall and by eco-segment.

Category dive

Size the opportunity in your category and for your brand by understanding what the Eco-segments are purchasing.

Global brand scorecard

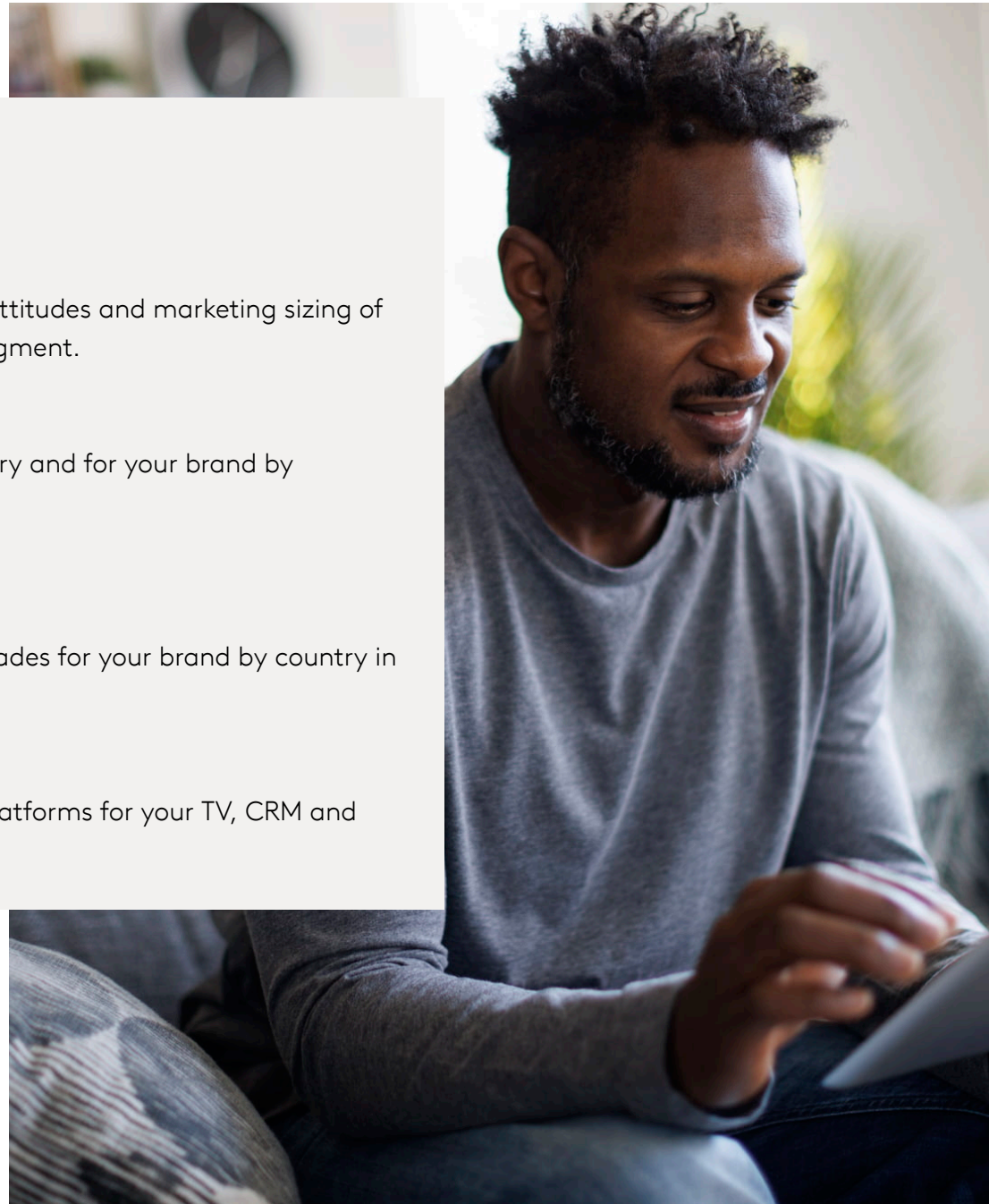
Understand your over and under trades for your brand by country in one view.

Audience targeting

Push our eco segments into your platforms for your TV, CRM and digital activations.



**Access our
commercial offer**

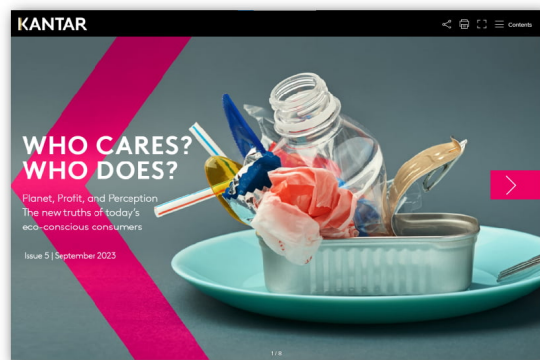


Food for thought

Explore our publications and discover our offer to find out how do we help brands grow.



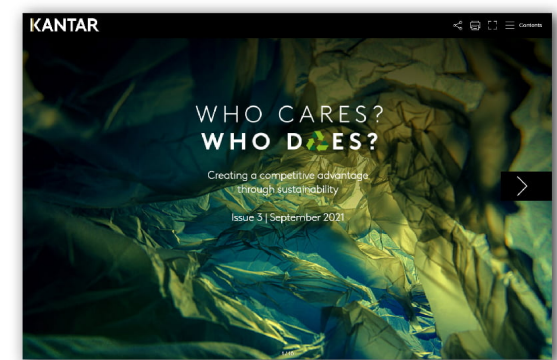
Food for Thought



Who Cares? Who Does?
2023



Who Cares? Who Does?
2022



Who Cares? Who Does?
2021

Kantar
in collaboration
with



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