## KANTAR



# Sustainability: The Australian Story

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

Sustainability matters to growing our global and local economy

USD\$12 trillion

Estimated annual size of the sustainable economic prize by 2030

## USD\$4.5 trillion

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

Source: World Business Council For Sustainable Development; World Economic Forum (2019) and Circularity Gap (2020); McKinsey and Company, How a post-pandemic stimulus can both create jobs and help the climate

## Sustainability is interwoven into the fabric of Australian society







**48%** Believe buying sustainable products shows others who they are and what they believe in

45% Pay lot of attention to environmental and societal issues in the news

42% See friends and family actively change their behaviour in order to be more sustainable

## Sustainability is a top of mind consideration

# 160/ or 4 million Australians

Are concerned about sustainability when making purchasing decisions (unprompted)

## Australians are seeking out sustainable options



## But not every Australian is on the same journey...

People have different key concerns in mind and a different understanding about what is causing the issues. They will also think of different kinds of solutions and will act with different degrees of intensity.



Actives – females



Engaged – males 18-34



Sceptics – males

Actively seek out 'do good' brands to invest in, stopped buying products from unsustainable brands and are most likely to notice if sustainable options aren't available.

Diligently seek out 'do good' brands to invest in but feel they aren't making a difference as just one person. Have a stronger belief that sustainable products are lower quality.

Not highly engaged in sustainability and have not dramatically changed their behaviour yet. They do support its core tenets but many want to do the right thing but aren't sure how.

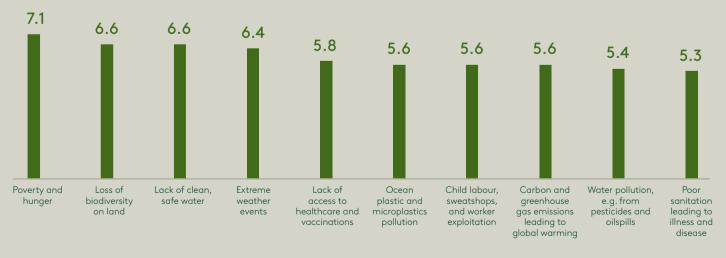
Unwilling to invest their time/money in more sustainable brands, don't believe it's a pressing issue or they'll be personally impacted. They also believe sustainable products are lower quality.

## The value action gap

### Despite the good intentions, we know that Australians can struggle to translate their values into action.

Helping consumers resolve tensions here is where brands can play a huge role.

## Top 10 concerns on sustainability (out of 21)



Kantar Australia Sustainability Foundational Study - Fieldwork run 8-14 Oct 2020 Q7a. Which of these issues are you most concerned about and which are you least concerned about? N=822

## BrandZ<sup>™</sup> top 100 most valuable global brands live with purpose



Source: Kantar BrandZ™ Global Database

## Authenticity is key in communications



With 'purpose' but weak fit with Brand



Without 'purpose'



With 'purpose' and fits with brand

Source: Kantar Whitepaper - The Emotional Power of Advertising

### Where to start

Kantar's framework for your sustainable transformation journey



Identify where to



play

Close the Value-Action



Develop your purpose and get communication right

Embed sustainability within employee culture



Put sustainability at the heart of the innovation process



Monitor your sustainability impact

Connect with our sustainable transformation team at kantaraustralia.com