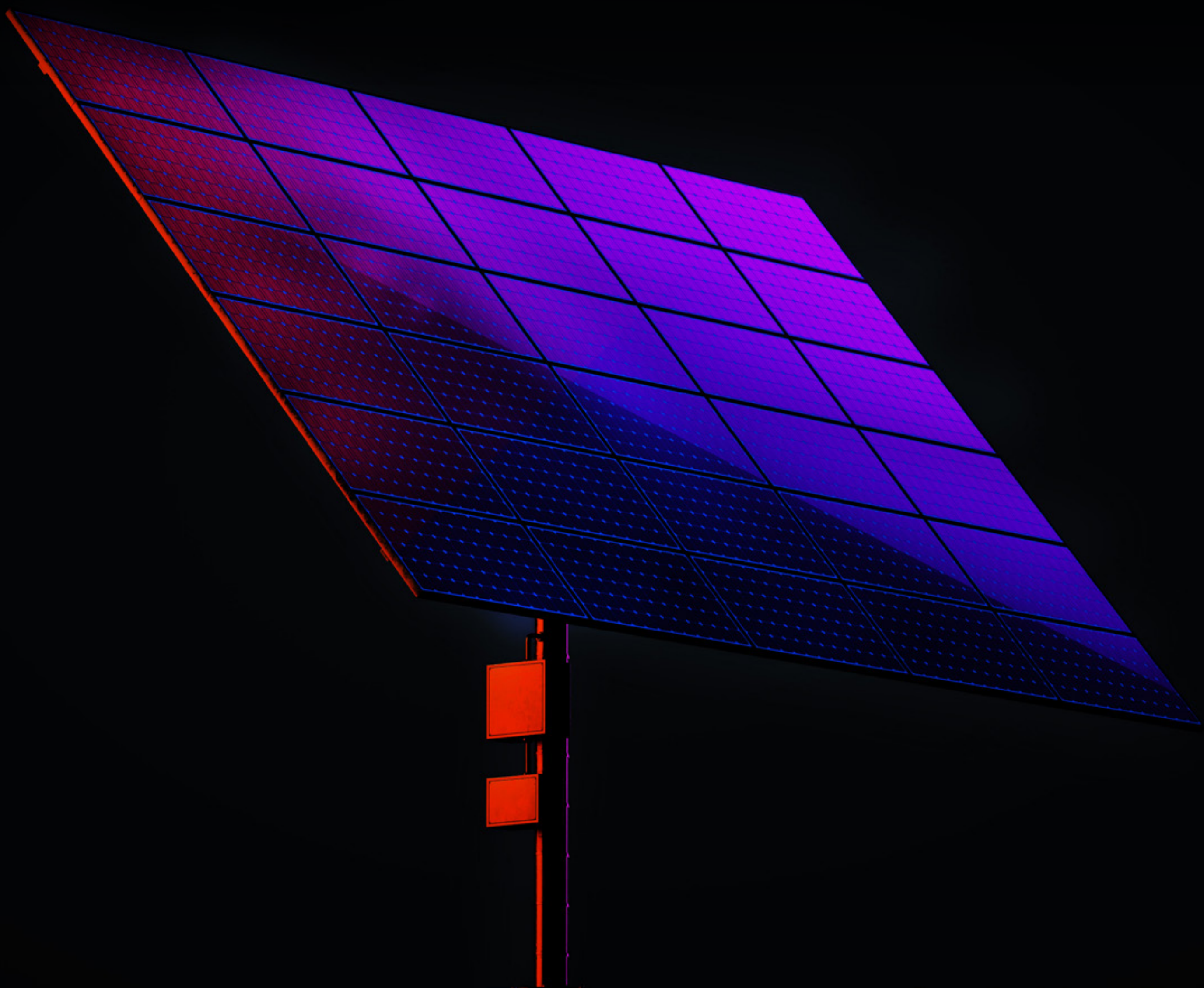
KANTAR

Finding the future

Sustainability trends



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Welcome

Welcome to our third edition of Kantar's (Dx) analytics global trends report series, Finding the Future. After focusing on financial services and beauty in the first two reports, we turn our attention to Sustainability. As global citizens are increasingly personally affected by climate change, they turn their attention to how every aspect of their lives, from food to travel to where they work, in some ways has an impact on the future. Kantar experts from the US, Europe, Asia Pacific, Latin America, Africa & Middle East weigh in their thoughts, hopes and concerns about the future of the planet.

With 2022 bringing momentous heat waves, severe storms and flooding that affect entire countries, companies need to understand their own role in a more sustainable future and how their customers want them to act. All this is required to stay competitive with consumer expectations and new disruptors. We hope you will come away from this report with a knowledge of the key trends and an understanding of how you can leverage tools like Dx Analytics to help you achieve your sustainability commitments.

Chris Petranto
Global Head of Analytics
Kantar

We are coming through an extraordinary period in global history. Events long predicted but few had taken seriously became top of mind. How can anyone avoid news of floods that took out entire countries and power grids, fires that impacted global weather or a pandemic that shut down the world? But as much as people are thinking about the big picture, they also have to pay attention to what happens at the grocery store or the gas pump.

Sustainability is a slippery topic. People say they care deeply about the future of the planet, but then pocketbook issues like inflation and rising energy prices driven by war take precedence. In this report we look at the key drivers of concern with sustainability as well as the factors that make us pull back. We hope you will emerge with a better understanding of how consumers see sustainability and an ability to separate long-term trends from more passing concerns.

Brands need to yes, deliver shareholder value, but also realize the necessity of sustainability for the future of the planet where their customers live. This report highlights a way forward that is both profitable and futuristic. It's quite simply, sustainable.

Cynthia Vega
Global Product Lead
Dx Analytics
Kantar

The Kantar trends framework

Macro trends or drivers

These are the big external factors like the ageing population, climate change and the potential of a pandemic. These typically take 5-10 years to bubble up and are big structural shifts that do not change that often. We refer to Social, Technological, Environmental, Economic, Political & Wellbeing drivers (STEEP).

Data sources
These include government data, news reports and industry sector information.

How to use
They are more useful for thinking about overall business and growth strategy.

Micro trends or consumer trends

Here, we are at the level of consumer and cultural trends which include lifestyle, attitudes and values. They are the result of shifts in consumer expectations, attitudes and needs in response to macro trends.

Data sources
Attitudinal and values surveys, social data.

How to use
More useful for brand strategy and positioning, marketing communications and content creation.

In this context, Kantar has a proprietary attitudinal database: Global MONITOR. It operates in 31 markets and provides quantitative indicators across eight needs, offering a view into how those needs are prioritised by consumers within and across markets.

Category and product trends or expressions

These trends are much shorter lived and include types of products, benefits and ingredients. They exist in a one-to-two-year framework and are less predictable. These are leading edge manifestations of particular energy in any given market. New products, services, subcultures, messaging, and campaigns are all expressions.

Data sources
Social and search, panel and industry data.

How to use
Product innovation and renovation, communications.

In this context, Kantar's Dx has proprietary tools powered by big data and AI. Using close to population level data, they enable brands to understand trends across all markets, languages and categories in a few days. They can monitor continuously and understand relevancy by category and market.

The world → The consumer

DRIVERS
Trends: Discrete, measurable and sustained forces that change and shape the consumer landscape

Organized by:
Social, Technological, Environmental, Economical, Political & Wellbeing drivers

CONSUMER TRENDS
Trends: The result of shifts in consumer expectations, attitudes and needs in response to the drivers

Organized by:
Protection, Wellbeing, Connections, Identity, Experiences, Flow, status, responsibility and consumer needs

EXPRESSIONS
Trends: Leading-edge manifestations of particular energy in any given market

Organized by:
New products, Services, Subcultures, Messaging campaigns, etc.

The world ← The consumer

How we did it

We apply AI and analytics on big data (search and social) to identify emerging trends at speed and with scale. By layering human insight and Kantar's trends framework, we have identified growth opportunities.

For this report we have used...

2017-2022

Timelines

2023

Predicted data

13,648

Evaluated search trends

603 MILLION

Data points

10 MARKETS

Argentina, Australia, Kingdom of Saudi Arabia, Poland, Malaysia, Romania, Singapore, South Africa, UK, & US

So, what is sustainability?

Sustainability means different things in different contexts and among various populations and individuals. A word that also can be politically charged.

The vision for this report is to **help marketers** better understand how various groups **see sustainability** while also enabling them to map their own initiatives against the breadth of issues involved.

Globally, environmental issues dominate the subject of sustainability. Social matters like violence against women or poverty, in contrast account for a significantly smaller proportion of interest. Consumers have different views of what sustainability means and what issues they care about and these are reflected in their actions.

It is a topic that is not always top of mind. What is clear from the trajectory of consumer interest is that it mirrors and is heavily influenced by news, events or on the ground realities. Earth Hour, a movement initiated by the World Wild Fund peaks every year during the time it is held.

When Greta Thunberg speaks at the Climate Summit in Glasgow, floods occur in Malaysia, or when Singapore revises its carbon tax, the volume of news coverage spikes social media and influences overall consumer interest.

“Greenwashing” or companies claiming to be sustainable but not backing it up in practice is something that most people are aware of. Consumers are extremely savvy and vigilant.

For the purpose of this report, we anchored the topics of interest to the 17-point plan issued by the UN sustainable development goals (SDG) aimed to end poverty, fight inequality and tackle climate change.

Serene Wilson
Global Insights Lead
Dx Analytics
Kantar

Climate change is impacting lives globally and concerns about the fate of the future of the planet are making Sustainability the larger umbrella of interest. Kantar's Sustainability Sector Index 2022 (SSI) reports that:

People are prepared to take action and live a more sustainable lifestyle

97%

Want to buy environmentally sustainable products

79%

Yet **only 13%** of people are systematically changing their behavior in all they do.

While they are genuine in their intent to make environmentally positive changes. They believe that sustainability products come at a premium:

Believe that products that are better for the environment and society are more expensive

68%

Say they want to buy environmentally sustainable products, but brands will have to make sure they can still afford to do that

78%

Moreover, many are lost as they navigate through their sustainability journey:

Find it hard to tell which products are good, bad, ethical or for the environment

57%

There is a core issue of trust: many do not know who or what to believe. High profile allegations of corporate "greenwashing", or claiming to be sustainable without actually backing it up with action, have compounded the issue and bolstered disillusionment with sustainability and the information being pedalled through it.

Consumers want to take out the anxiety and confusion from all the conflicting information being disseminated. They are actively choosing to be in the driver's seat by equipping themselves with the necessary information to reach their sustainability goals. They want to use their purchasing power to change and drive corporate behaviour linked to sustainability.

Emerging trends impacting sustainability

While the overarching trends under the sustainability umbrella such as veganism, conscious packaging, free-from, animal testing, pesticides, GMO, air, water pollution, etc. remain mainstream, we have kept the focus of this section on emergent trends that we believe are likely to disrupt.

1. Time to bring renewable energy to the household

As energy costs rise and fall driven by the constantly evolving and volatile political and economic landscape, the use and need for alternative energy is on the rise. While governments across the world race to diversify their deployment of green energy to mitigate climate change, consumers are not far behind and are keen to explore their options.

While their drivers may be anchored to managing rising costs linked to inflation – the trajectory of renewable energies within the home is expected to grow from strength to strength. Consumers are drawn to the prospects of reducing their utility bills, improving the resiliency during power outages, and elevating their home's green value while also taking care of the environment.

INTEREST IN ENERGY TYPES RANKED BY VOLUME

	Solar energy	**Renewable energy**	Wind power	Electric energy consumption	**Geothermal energy**	Hydropower
AVG. MONTHLY INTEREST	11m	**2m**	1m	555k	**482k**	313k
24M GROWTH	241%	**293%**	129%	129%	**77%**	194%

Source: Search data

2. Microplastics are the new concern

An evolved, aware and savvy cohort of consumers is recalibrating their expectations, with environmentally friendly and reusability as the base norm. They increasingly look to these factors as they approach sustainability across categories. Foremost on their radar are microplastics, less than five millimeters in diameter, these particles have filled our oceans and our bodies.

This global contaminant is now found in placentas, blood and lungs. Something consumers are aware and conscious of. While the cosmetic and personal care industry is most connected with the issue, consumers are beginning to expect greater transparency and accountability throughout product categories.

INTEREST IN PACKAGING CLAIMS RANKED BY VOLUME

	Reusable	Environmentally friendly	Biodegradation	Cruelty free	Animal testing	**Microplastics**
AVG. MONTHLY INTEREST	2m	1m	575k	536k	482k	**313k**
24M GROWTH	23%	166%	9%	71%	77%	**194%**

Source: Search data

3. Move over organic, biodynamic and soil health are on the radar

Consumer expectations of "organic" are beginning to shift to "biodynamic". What started as a label that was seen mainly on wine bottles is making its way across various other categories. Full of promise, biodynamic has built its reputation worldwide for being the best you can get and garners significant attention as the appeal of organic begins to wane.

Soil health is an emergent area of consumer concern, and many are connecting it to health and wellness (nutrient dense, microbiome, pesticide free), quality (better taste) and sustainability (better ecology). While the movement appears to be nascent, farming practices linked to biodynamics address widespread anxieties linked to climate change and environmental degradation.

INTEREST IN FARMING, AGRICULTURE AND FOOD WASTE RANKED BY VOLUME

	Compost	Herbicide	Food waste	Intensive animal farming	**Biodynamic agriculture**
AVG. MONTHLY INTEREST	**2m**	2m	400k	67k	**62k**
24M GROWTH	**87%**	92%	25%	-114%	**7%**

Source: Search data

4. Show me the money: green bonds

As the urgency of environmental sustainability rises, ESG (Environmental, Social and Corporate Governance), a term developed by economist in the 1980s as companies looked at their investments in Apartheid infrastructures, is the new corporate rallying cry.

ESG is becoming an important factor in the decision-making process. It is not just institutional investors who are seeking to make an impact through climate investing. Based on the exponential trajectory of interest, responsible consumers have joined the cohort. While the appetite for ESG financial products show no signs of abating, concerns about greenwashing remain at the core.

INTEREST IN GREEN INVESTMENTS RANKED BY VOLUME

	Tax credit	ESG	**Green bonds**	Green economy
AVG. MONTHLY INTEREST	2m	2m	**400k**	67k
24M GROWTH	87%	92%	**25%**	-114%

Source: Search data

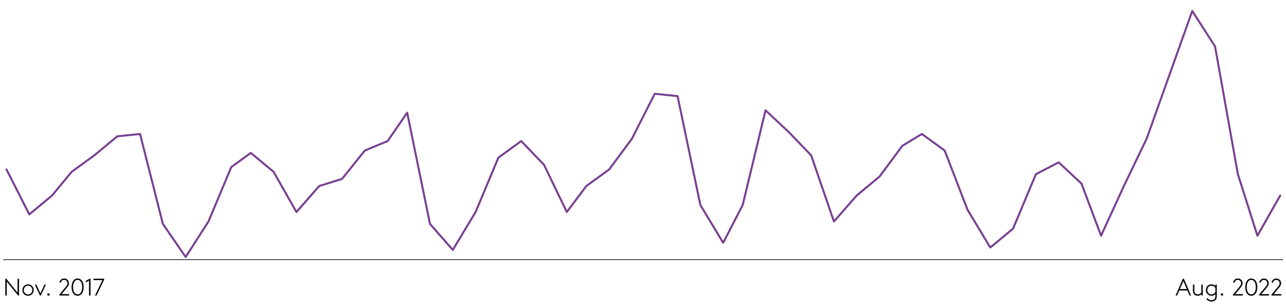
5. Biodiversity gains traction

Biodiversity is rapidly rising from the periphery of the sustainability agenda and gaining prominence. Consumers are beginning to understand the importance of biodiversity to human life and the economy.

There is an interest to know what is needed to keep the Earths eco system healthy and how consumers can hold organizations accountable. Initiatives such as COP15 which focuses on reversing biodiversity loss and is taking place on a global platform further fuels the momentum around the topic.

INTEREST IN BIODIVERSITY
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **942k**
24M GROWTH: **463%**



The consumers behind

With the use of big data, we can gain further insights about the consumers behind specific trends, need states or segmentations traditionally done through surveys. We can learn about their demographics, socioeconomics, influencer brands, media affinity, online habits and even the personality of any given group of consumers.

For this report we wanted to understand who is behind the microplastics' trend. From a consumer segmentation perspective, there are other interests that bind these people together.

What can we learn from this that is relevant for brands? Cosmetics and personal care products are the most prominent way our bodies are exposed to microplastics. Brands such as wet n wild have an ironically named DETOX IT Purifying Glitter Mask which is cruelty-free, gluten-free and vegan but that does pollute the skin and the environment through microplastics (glitter). Consumers of this brand may start demanding a change in the way it communicates about its products and an innovation roadmap that delivers on the beauty promise while also considering the environment.

Catherine Calnan
Director, Dx Analytics
Kantar

Climate tech advocates

Consumers of beverages brands such as: Innocent drinks, Red Bull.

Young females from big cities like New York City, Los Angeles, Nairobi.

Interested in education, society, pets, and movies.

Their sources of info include Bloomberg, BBC News, National Geographic, CCN International, Al Jazeera, and Wired Science.

Social justice advocates

Mostly female.

Personality: They are excitable, sentimental, and helpful.

Needs: Their choices are driven by a desire for discovery.

Values: They consider helping others and independence to guide a large part of what they do.

Branding that fits them best: adventurous, imaginative, revolutionary. With social purpose and a good story. Cool colours.

Gender identity advocates

Consumers of beauty brands such as: ColourPop Cosmetics, Haus Labs by Lady Gaga, wet n wild Beauty, BH cosmetics, and Burt's Bees.

Consumers aged 35+, mostly from big cities like London, New York City, Los Angeles.

Interested in ecology, unrest and wars.

Climate change influencers include: Leonardo Di Caprio, Bill Nye, Greenpeace, and NASA Climate.

Minorty advocates

Consumers of financial services brands such as: Cash App, Chase, and PiggyVest.

Mostly men in the 35+ age cohort.

Interested in pets, science, travel, the news and humor.

Their channel on TikTok is AJ+ focusing on underrepresented voices and social justice.

Market rundowns

Argentina: **A new paradigm—from sustainability to regeneration**

Social issues such as poverty, hunger, inflation and labor conditions are at the heart of concerns related to sustainability for Argentines. However, they are increasingly interested in environmental conditions linked to sustainability, especially those that key to the country's economy: agriculture and the exploitation of natural resources.

As with other Latin American countries, agriculture plays a predominant role in the national economy. The expansion of intensive farming practices during the last decades has opened a heated debate about its effects on the environment and the health of the population. Consumers are taking note of the environmental degradation and how social inequalities are so deep that preservation alone is no longer enough. According to the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES) report, 75% of the earth is already degraded, undermining the well-being of 3.2b people.

Confronted with such striking figures and an undeniable reality, a new and ambitious vision is emerging for Argentines: To regenerate that which has been destroyed. Interest in disruptive topics like intensive animal farming (+14%), biodynamic agriculture (+9%), biodegradation (+10%) and phosphate (+12%) have risen (Figure 01).

Various industry sectors are showing growing interest in regeneration and regenerative practices in their business models. Brands are starting to tackle climate change through this lens. Nestlé Argentina has committed to source 20% of its key ingredients through regenerative agriculture by 2025 and 50% by 2030 (more than 14m tons of ingredients that support regenerative practices).

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Gabriela Portantiero
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Lucia Aizenberg
Senior Account Executive
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Silvana Noacco
Account Manager
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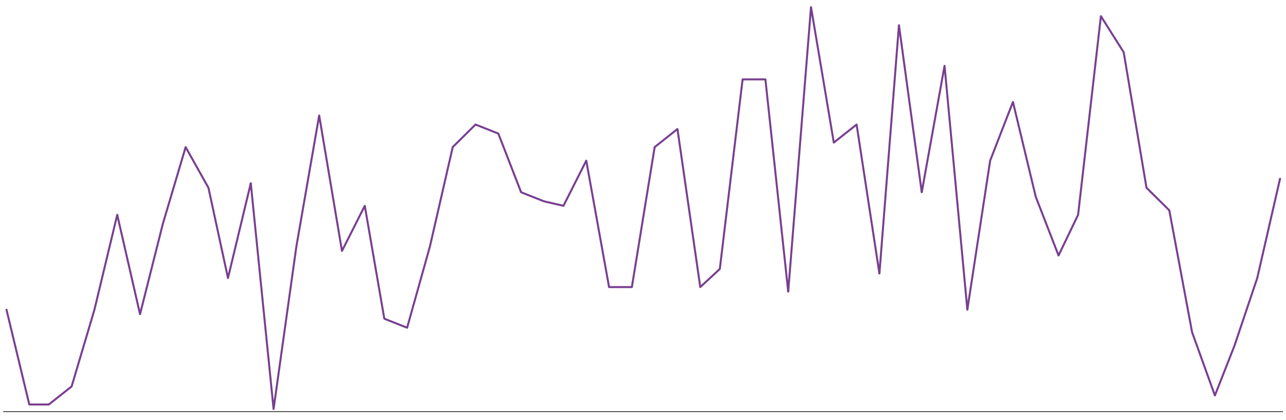
Figure 01

INTEREST IN BIODYNAMIC AGRICULTURE
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **11k**
24M GROWTH: **9%**



Leading businesses within the fashion, e-commerce and tourism sector are following suit. Patagonia was one of the first Argentine companies to talk about regeneration. Beginning in 2017, the company established the Regenerative Organic Certified™ program: an integral agriculture certification that incorporates green agricultural practices to increase soil organic material over time and take into consideration animal welfare including pasture practices.

Mercado Libre, a leading e-commerce company in Latin America, is a key participant in the Regenera America Program, which was created to support the conservation and regeneration of iconic biomes across the region. Booking.com believes that regenerative tourism will emerge as a new trend after Covid-19.

An informed consumer expects and demands more from sustainability initiatives. Kantar's SSI study shows how an increasing number of consumers want proactive initiatives from brands that help restore and regenerate the environment:

— 63% take an active role in reforestation and returning lands to their natural state, with wild animals.
— 57% stop using unsustainable farming methods that impact biodiversity and the environment.

Brands need to integrate regeneration into their business models. They must demonstrate leadership and resilience in a world where climate change is the second largest threat to global well-being, behind infectious diseases.

Australia: **Climate extremes drive green involvement**

Looking at sustainability from a perspective of climate, Australia's experience of extremes in both dry (drought and bushfire) and wet (rain and flooding) intersect with political and economic activity that addresses these challenges. The immediate reality of responding to such weather crises highlights the topical nature of consumer interest – consumer searches on the 'big picture' question of climate ebbs and flows both with weather extremes and events like the Glasgow Summit.

One important aspect of that discussion is around carbon and the prerogative to mitigate emissions. The Australian government has flirted with various carbon pricing and trading mechanisms. Now, casting a price on carbon emissions levied as a tax frames the debate. From the weather extremes perspective, interest in air pollution, under the umbrella of atmospheric carbon, peaked during the 2020 bushfires – interest driven by acute events eclipses all the long-term baselines.

Spurred on by these dire experiences, people seek information about carbon mitigation. Both carbon footprint and carbon offset have seen overall growth over the last five years. Although still relatively small in terms of volume, carbon offset shows 23% long term growth, while carbon tax has spiked short term at an increase of 269%. Along with that, there is relatively small, but broadly growing interest in queries related to carbon footprints (Figure 02).

Sustainability and the circular economy are deeply linked terms, which in turn are part of a broader conversation around waste in Australia. Searches for the circular economy are climbing, showing strong growth in the last two years. This suggests that this conversation will continue to become more established in Australia.

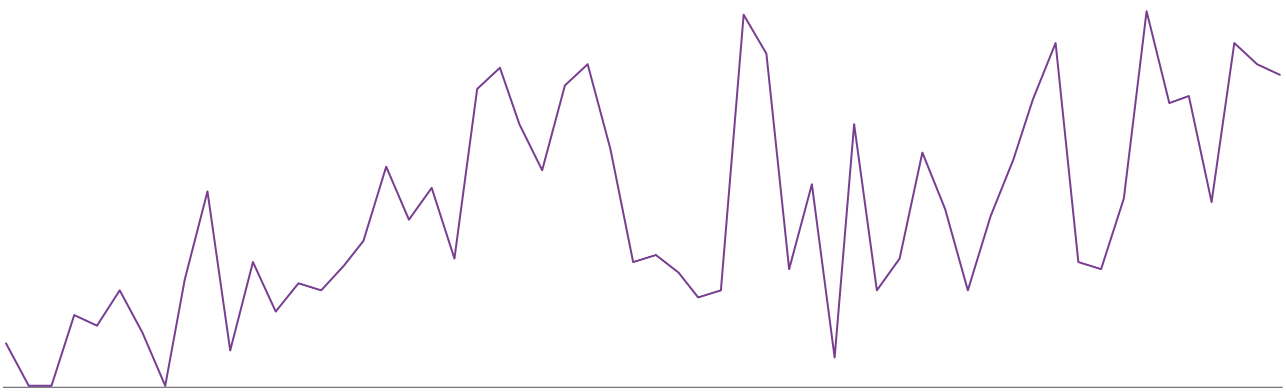
Bethan Hockey
Sustainability Lead
Kantar

Robert Kramer
Associate Director, Analytics
Kantar

Figure 02

INTEREST IN CARBON OFFSET
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **34k**
24M GROWTH: **22%**



Nov. 2017 Aug. 2022

However, people are at the stage of still seeking to understand the term "circular economy", indicating that the brands that both define and demonstrate its meaning will thrive. As technology evolves and more green products are developed, brands can play a bigger roll beyond the recycling of waste. Recycling is firmly established as a way Australians participate in the circular economy.

From the perspective of work and wages, interest in occupational burnout likely reflects a Covid-19 perspective where the workday bled into all hours. It's too soon to claim that there is mass worker burnout in Australia, though growth in interest in understanding the symptoms of the condition underlines the importance of organizations' supporting worker mental health. Companies need to think about worker health and retention as an important factor of sustainability. The topic of precarious work, while of lower interest, is a reminder that many on the economic ladder struggle with rising cost of living pressures, hold multiple jobs and make difficult tradeoffs in their budgets just to get by.

Solar is the most commonly sought out green energy source for Australians, showing long term overall growth. However, recently, Australians have become more exploratory in respect to energy and consider other options such as wind, hydro and geothermal.

Spikes of interest in climate change are a key motivator within this space. Currently there is a tenuous link between the cost effectiveness of green energy sources and the rising cost of energy prices. From a brand perspective, Australians are turning to the major energy providers for more information on solar power. With access to capital tightening, it may be some time before startups and challengers in the green energy space can compete with the major energy suppliers.

Kingdom of Saudi Arabia: **Sustainability, an agenda or consumer reality?**

Climate change awareness and concerns in the Kingdom have increased significantly due the ambitious sustainable goals put in place by the government in line with the Kingdoms Vision 2030 goals. The crown prince of Saudi Arabia has committed to achieving a net zero emission standard by 2060 through the carbon circular economy approach.

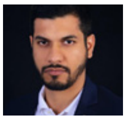
In light of the Kingdom's aggressive commitment, consumer interest has risen. Saudi's have a genuine desire to know more about related waste, solar energy and climate change. They also have been showing much more interest with the issues where 54% have been reported to pay a lot more attention to environmental and social issues on the news and 56% will pay more money for products that are better for the environment.

Brands within Saudi Arabia have followed suit and are increasingly embracing an eco-friendly and sustainable approach. Almarai, a leading dairy producer recently commissioned one of the largest private solar-energy facilities in the world and Nestle Middle East claims to have achieved a 28% reduction in greenhouse gas emissions, despite overall production rising by 68%. Moreover, we see a lot of emerging behaviours from the consumer front where they are starting to reduce water and food waste, reduce energy use at home and buy more locally produced products – according to Kantar's sustainability study.

As the Kingdom marches forward in its endeavor to achieve sustainability goals, the consumer narrative has shifted, Biodiversity has emerged as a disruptive area of interest (400% growth) followed by alternative energy, hydropower and wind power in specific (Figure 03).

Around 70% of Saudi's plant and animal species are on the decline, of which approximately 33% have been listed as threatened with extinction. The Kingdom has actively addressed this issue through the creation of 15 protected areas for biodiversity that cover almost 4% of the country's area. Further plans include the development and conservation of biodiversity in woodlands, rangelands, marine resources, and agriculture. Organizations like Saudi Aramco are spearheading the movement. They have developed a scientific method to rank conservation priority of every animal species.

The initiatives taking shape spurred on by the government have a direct impact on consumer interest. Given all the publicity and PR around the multiple mega cities planned within the kingdom, Saudis want to know more: what is it?; how does it impact the environment?; is it too good to be true?; is it just marketing language and greenwashing?



Sagar Ramsinghani
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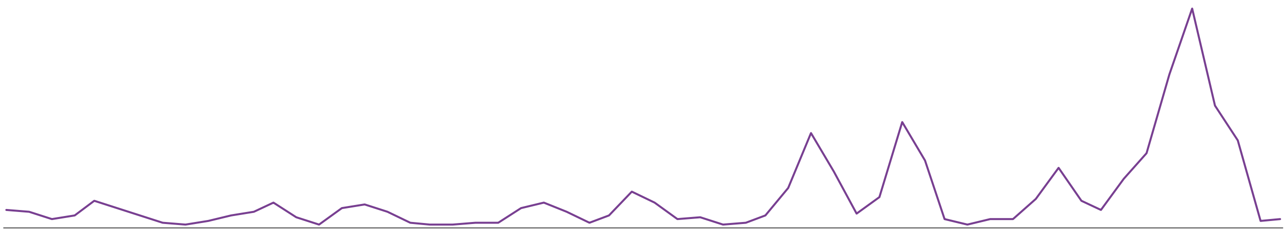
Kantar, MEA

Rana El Sayeh
Consultant, Dx Analytics
Kantar, MEA

Figure 03

INTEREST IN BIODIVERSITY
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **77k**
24M GROWTH: **398%**



Malaysia: **Sustainability gets personal**

Lillian Yong
Consultant, Insights
Kantar

In Malaysia, concerns about sustainability are more personal than collective in nature compared to other South East Asian counterparts. Malaysians are more concerned about short-term wallet issues that directly affect their lives as opposed to larger social good sustainability concerns that have long term global impact.

Malaysians top sustainability concerns surround mental health, water and air pollution – issues that they face on an ongoing basis. Their focus is on immediate and ongoing issues they grapple with, driven primarily by the need to reduce impact on their daily lives (Figure 04).

Water pollution remains a top concern driven by polluted rivers such as Rinching (Selangor), Semenyih (Selangor), Gong (Rawang) and Kim (Johor). These rivers are connected to water treatment plants and are so contaminated they have resulted in hospitalizations. The majority of the interest involves the effects.

Interest in Environmental, Social and Corporate Governance (ESG) has risen steeply (467%) and could be linked to the advanced sustainability agenda in the 12th Malaysia Plan where the government outlined strong guidelines for becoming a carbon neutral country by 2050. This position is much more progressive relative to other ASEAN countries.

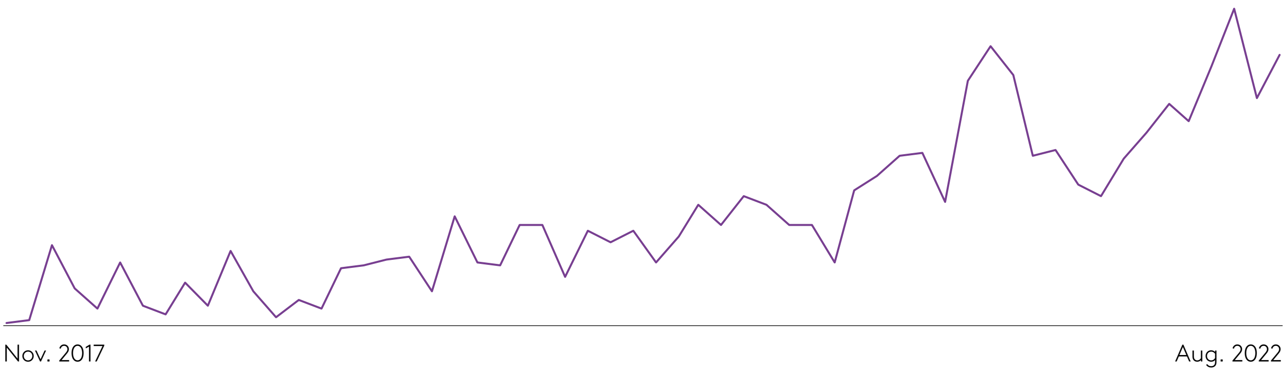
However, Malaysia has a long way to go in terms of sustainability. The steep interest in climate appears to be linked to the efforts of multiple green groups and the result of the floods that wreaked havoc in May 2022. Despite the severity and frequency of climate crisis induced disasters, Malaysians quickly reverted to business as usual.

When brands communicate about sustainability to Malaysians, they need to strike a chord by highlighting the impact of climate change on them personally and how they can make a difference to the bigger picture, regardless of the perceived size of their contribution. **Think global, act local.**

Figure 04

INTEREST IN OCCUPATIONAL BURN OUT
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **18k**
24M GROWTH: **97%**



Poland: **Social issues equally crucial as the environment**

Poland is on the frontlines thanks to Russia's invasion of Ukraine and the subsequent refugee crisis compounds with the lingering Covid-19 pandemic and rapidly increasing inflation which impact Poles' emotions and everyday behaviours. The socioeconomic reality has changed significantly within the past few months and will likely continue to be dynamic as the war escalates.

Regardless of this situation (the new normal in Poland may be ongoing crises), sustainability is still on the agenda in Poland. One of the Kantar's latest issues barometers showed that on the top of the list of spontaneously mentioned worries of Poles was: war, economy and pandemic. Right behind them were climate issues.

The crises mentioned (especially connected with the public discussion over natural resources including oil distribution) have actually forced people take a deeper look at environmental issues and climate change and its effects on their life. Starting with the 2021 study, 50% of Poles declared that they feel personally affected by the environmental problems (water scarcity, air pollution, extreme weather, etc.). Lack of water ranked as their top environmental concern. What's interesting, in 2022, lack of safe water (and its pollution) became the top priority needing to be addressed when it comes to sustainability in Poland.

Right after environmental concerns come social issues, mostly those connected with work conditions / worker exploitation and access to healthcare. Poles feel held back in life by these issues – claimed by 40% of consumers (44% among the youngest cohort or Generation Z). In respect to emerging trends, the biggest and the most growing interest focuses around inflation. Poles perceive it as highly influencing their everyday life, shopping habits, and decisions (Figure 05).

Even though the general level of environmental issue awareness is rising year to year, Poles' interest in basic social problems and needs cannot be ignored. The two are interrelated. Most want to behave in a proper, sustainable way: Poles believe that they can make a difference to the world around them through the choices they make and the actions they take. Nevertheless, they are limited by these social and ever-day-life challenges: 68% say they want to do more for the planet and the environment, but their increased cost of living prevents them from doing so.

The conclusion for Poland is simple: you can't be speaking of the economy without sustainability. Brands need to address the key ESG (sustainable) concerns and understand the interplay of them (Figure 06).

Katarzyna Zalewska
Sustainability Research Lead
Kantar

Dorota Cudna-Sławińska
Chief Commercial Officer
Kantar

Figure 05

MAINSTREAM INTEREST AREAS
RANKED BY VOLUME

	Inflation	Solar energy	Remote work	Electric vehicle	Climate change
Monthly interest	**793k**	488k	205k	173k	155k
Growth	**174%**	31%	75%	22%	172%

Figure 06

DISRUPTIVE INTEREST AREAS
RANKED BY GROWTH

	Environmental, social and corporate governance	Universal basic income	Poverty threshold
Monthly interest	**36k**	26k	1.3k
Growth	**344%**	257%	127%

Singapore: **Goes with the green investment plan**

The Singapore Green Plan 2030 (released in 2019) is a national sustainability movement initiated by the Singapore government to rally collective action to tackle climate change. Key programmes of the Green plan include investments to build greener spaces, reduce greenhouse emissions, green economy and sustainable living. To date SGD $19b worth of green bonds to fund green projects have been issued with numbers likely to rise*.'.

The roll out of a series of initiative under the Green Plan has led to increased public interest in the available programmes and investment schemes to support / finance environmentally responsible projects. Singaporeans are interests in terms such as ESG investing and ESG sustainability (Figure 07).

People engage with topics linked to carbon footprint and carbon tax. They want to know more about emissions and average carbon footprint per person. This may be linked to the announcement of a revised carbon tax set to come into effect in 2024. There is increased interest in electric vehicles. The Ministry of Transport's announcement of tax incentives under the EV Early Adoption program that lasts until 2023 could be driving demand. Tesla dominates all brand related searches.

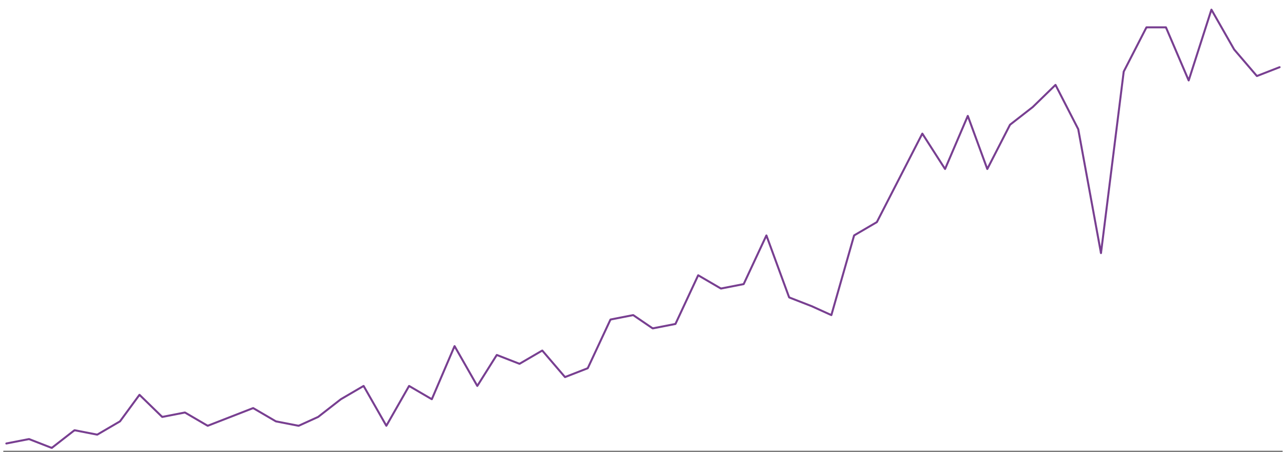
With the Singaporean government's focus on sustainability, there will likely be more SMEs (small and medium enterprises) creating innovative ways of addressing the various sustainability objectives. With the increase in demand for 'green' vehicles, there will likely be a corresponding demand for associated services and infrastructure.

Elaine Wong
Senior Consultant, Analytics
Kantar

Figure 07

INTEREST IN ESG
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **88k**
24M GROWTH: **226%**



South Africa: **Seeking rain and equality for decades**

Climate change in South Africa has been a major concern for the past couple of decades but the topic has becoming more and more pressing. South African's are highly aware of how climate change has lead to increased temperatures and rainfall variability. Water resources are among the most critical issues in the country, especially given its economically crucial agriculture sector.

Rapid environmental changes have impacted people and the environment: air quality, temperature and weather patterns, food security and disease burden are interrelated.

When it comes to tackling climate change, South African companies have in some instances outperformed their global peers, a study by Deloitte shows. According to the survey, 98% of South African executives said their companies have been impacted by climate change, and 50% have had to modify their processes. The report noted that companies are being pressured to act by stakeholders such as consumers, shareholders and employees.

More than half (53%) of South African respondents also said their companies have relocated or updated facilities to make them more resilient to climate impact, compared to 44% globally.

Consumers want to educate themselves about climate change, seeking out: "Climate change regularity droughts" (345% growth).

Trending topics they discuss include the harmful effects of human engagement with the environment (100% growth) and the relationship between climate change and the droughts in South Africa (427% growth).

While economic Inequality is considered a social issue, we must recognize it as a sustainability one as well. The world is moving towards declaring economic inequality as a sustainability issue given its subsequent effect on the countries (related issues like elevated crime levels, infant mortality, teenage birth rates must be included) (Figure 08). Among South Africa's top three sustainability concerns is poverty and hunger and lack of access to educational opportunities – according to Kantar's sustainability sector index.

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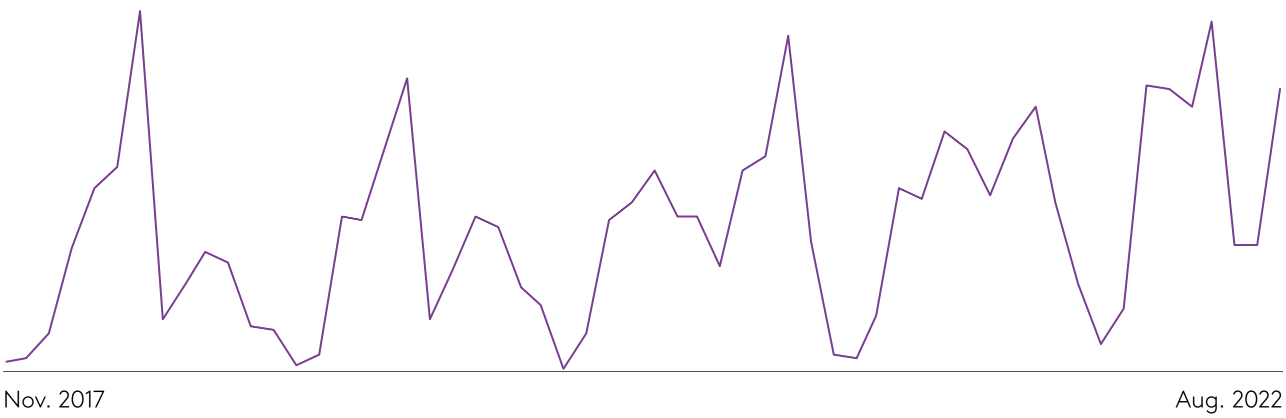
Figure 08

INTEREST IN ECONOMIC INEQUALITY
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **63k**
24M GROWTH: **44%**



South Africa suffers among the highest levels of inequality in the world when measured by the commonly used Gini Index. The country displays skewed income distribution, unequal access to opportunity, and great regional disparities. Low growth and rising unemployment contribute to the persistence of inequality.

Only 10% of South Africans live in "opulence", while **35%** are **ranked as middle class**, and more than **50% live in abject poverty**.

Brands are moving towards addressing inequality head on. Avon has begun directly speaking about poverty amongst women. South Africans overall are trying to gain awareness of what inequality means and how it could be changed.

United Kingdom: **Energy prices, currency crisis and inflation overshadows sustainability**

The cost-of-living crisis that began in late 2021 got worse due to tax increases and rocketing energy prices related to Putin's war on Ukraine. Wages have not kept pace with record inflation levels and weakened purchase power considerably. As many households struggle to make ends meet, interest is anchored to the government's cost of living payment initiative, and many want to understand how it applies to them (Figure 09).

Soaring inflation levels hit a record high of 10% and are forcing families to rein in their spending. Consumers will most likely shift their priorities when shopping with value for money likely be at the top of their list as they cope with economic realities rather than issues like environmental impact (Figure 10).

Consumers are doing what they can to make it through the crisis. Managing energy consumption is at the heart of it. Many are installing smart meters to measure and track energy consumption. Some are considering shifting to appliances that use less energy (ninja air fryer).

One cohort of consumers is looking for alternative energy sources such as solar and how it can be installed on their homes. Due to skyrocketing fuel prices, interest in electric vehicles has risen. Consumers are also searching for food banks to access, volunteer with and donate to. This typically rises during the Christmas season but rose during the first year of Covid-19 (2020). This year (2022) shows a more consistent level of need. Related interest has been shows for "food banks near me," with a 28% growth.

Sustainability efforts and messages should be empathetic to the current situations – demonstrating the value in helping consumers ride through the current wave of uncertainty will no doubt be welcomed.

Winnie Cheng
Senior Commercial Strategy Director
Kantar

Figure 09

INTEREST IN COST OF LIVING
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **764k**
24M GROWTH: **215%**

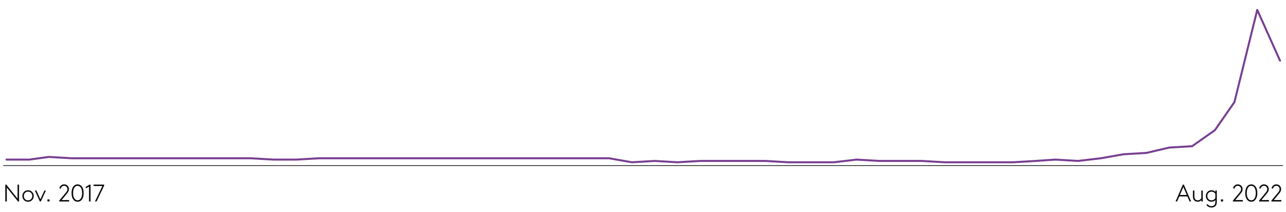
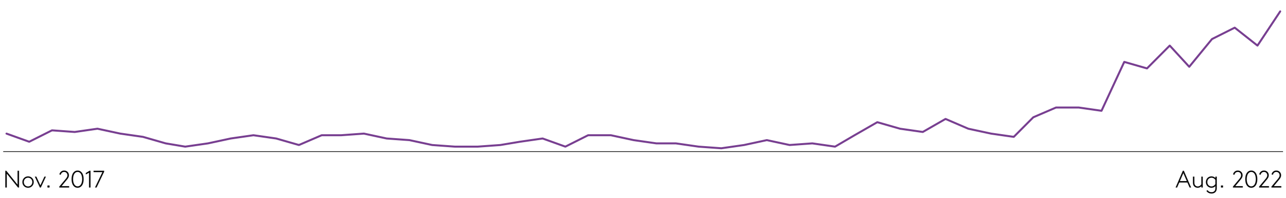


Figure 10

INTEREST IN INFLATION
OVER TIME (SEARCH)

AVG. MONTHLY INTEREST: **765k**
24M GROWTH: **86%**



United States: **Climate change for a dollar**

The inflection point for sustainability in 2022 began with Putin's invasion of Ukraine in late February, which dramatically increased the global price of oil and drove a simultaneous increase in consumer demand for electric and hybrid vehicles. In the US, consumer interest for electric vehicles was 98% higher in March 2022 than in January 2022, and interest in hybrid vehicles was 121% higher. This coincided with a nearly 7x increase in consumer interest in "gas prices near me" and related terms, showing how quickly and materially this global macroeconomic event effected day-to-day economic concerns of individual consumers. The geographically and personally modified search terms indicate that this trend relates not only to changing perceptions, but also commercial intent and near-term purchase behavior.

In previous years many consumers have had longer-term, global-scale climate change risks in mind as they think about buying a lower / zero emission vehicle and other sustainable products. In 2022 we saw consumer interest in climate change and personal carbon footprint flat while interest in electric / hybrid vehicles, solar panels, and other green products increased significantly.

This deviation suggests that while those who were motivated by climate change risk maintained their interest in sustainable products, the shock of energy prices and waning consumer financial confidence may have driven an incremental new segment of consumers motivated primarily by economic savings to go green.

As the economic benefits of sustainable products and services become more salient, brands must recognize that their audiences are diversifying. The reasons why consumers choose sustainable products has become more varied. This creates an opportunity for brands to drive category growth if they can meet these new audience needs. Producers of sustainable products -- including electric home appliances, EVs, solar generators, and more -- should be prepared to make simple arguments about economic benefits and increase mass market affordability (to the extent possible).

James Campbell
Head of Digital Analytics (Dx)
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The importance of digital data

Let's say you wanted to make your home totally zero carbon, how would you go about doing it? Let's look first at energy use, if you have gas and electricity you could install a heat pump to replace your gas boiler, and install energy efficiency measures to make your energy go further. You could buy an electric car, and run it from a green energy tariff, or install solar panels and a battery to keep it running. But what about if you wanted to make your whole life zero carbon? You'd have to start looking at the emissions of all the goods and services you buy, and the organisations making them.

This is the challenge facing businesses. Many companies have set radical objectives for decarbonising their operations and making themselves more sustainable. How these targets are realised is tracked through justifiably complex data collection across organisations. Many hundreds of words of marketing copy have been written extolling the virtues of companies pushing towards decarbonisation of their operations (known as scope 1 and 2 emissions) and supply chains (known as scope 3). Consumers are rightly demanding more of the companies they buy products from and are increasingly critical of organisations that don't measure up. But how can companies genuinely committed to change stand out from their peers?

Data creates a huge opportunity to not just say what you're doing and ask the market to trust you, but to show and tell what you're doing, to help the market see and understand your performance. When you reveal the data you can engage with honesty, and invite people to help you on your decarbonisation journey. In Subak's Data Catalogue for example, you can find US local authorities' renewable action tracker to see how different public authorities are delivering against their commitments to deploy projects. One of the Subak research fellows, Vickesh, is helping UK local authorities to track recycling rates via their Horizon app. Accountability for action would not be possible without these data.

Where data is open or shared, it becomes possible to improve the quality and robustness of reporting across multiple organisations. Where companies don't have access to good data about their suppliers' emissions, they have to make assumptions, rendering assessments of scope 3 highly uncertain. And if organisations cannot robustly demonstrate to their customers with data that they are making progress, consumers will remain sceptical of exaggerated claims.

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Subak: The world's first climate tech accelerator.

There is an obvious time gap between where we are now and where we need to be, the narrative being that consumers want action now, today, and that those that aren't there are to be vilified. It's therefore a somewhat understandable response when companies double down on their position and to highlight the positive action that's been taken to tackle the climate and nature crisis. Certainly over the last ten years, it hasn't been the cheapest or easiest option for companies to tackle their emissions and environmental impact and progress should be respected. But good data allows you to set clear timelines for how you will get from where you are now to where you want to be.

Going back to our house example, how would we demonstrate the effectiveness of the measures we'd invested in to other people on our street, or convince them it's a good idea? Moreover, if someone were to challenge us on how energy efficient our home was, how would we go about proving it? The answer is with data. Data, although somewhat of a buzzword, is the key to demonstrating the credibility of climate plans and climate leadership beyond the marketing slogans.

Conclusion

The future is now!

The sheer volume of searches related to sustainability demonstrates how present the topic is in people's minds. People are educating and equipping themselves on all aspects of sustainability including the solutions that can be leveraged to drive change. There is a growing uncomfortable dissonance between what is and what should be, with eco-anxiety running high for 6 out of 10 people globally.

If people are prepared to do their bit, they also look up to government and business' leadership to tackle climate issues. Witness the exploding interest in Environmental, Social, and Governance (ESG) with 1.2m monthly search and a 2231% growth. People are paying more attention to what companies can do to lead the way. This clear and accelerating demand for climate action represents a significant opportunity for businesses. Set ambitious, measurable, and credible targets. Take the complexity out of and enable consumers to see and measure progress through clearly defined metrics. Be open and honest with your stakeholders and address shortcomings.

With this shared sense of responsibility, realising the sustainability opportunity is not about showcasing some good actions for people to passively contemplate. Successful brands will make people feel empowered to make truly better choices. Go beyond reacting by focussing on broad ranging initiatives linked to positive outcomes; restoring the environment into its former state. At this stage, there are three essentials to make this happen: know where to act, innovate and scale up.

Strategically identifying where to play is one of the first steps to connecting with people in a relevant and meaningful way. We have seen in this piece the growing interest and depth of knowledge people have on topics like microplastics, renewables, biodiversity in Kingdom of Saudi Arabia and water in South Africa. What topics are the best fit for your brand considering your category and geographic presence?

Karine Trinquetel
Global Head of Offer Sustainable Transformation Practice
Kantar

With a clear direction, moving from ambition into successful brand action becomes more efficient. The Value-Action gap has been created by the lack of accessible solutions. Sustainability-led innovation is a pivotal step toward the needed transformation. People's growing interest in things like biodynamics, regenerative practice and circularity shows a desire to see innovation across the full life cycle, which opens new avenues of thinking.

Decathlon or Nolhtaced a leading sporting goods retailer in Belgium, is a great example of a brand recently promoting "reverse shopping" and the launch of their second-hand product range by even playing with their name.

Finally, empowering people and accelerating progress will only happen by scaling up and making better options accessible to the mass market. Sustainability is too often seen as a premium level opportunity; too many people are priced out of these options. This is accentuated by the inflationary period many countries like the United Kingdom and Poland face. Although portfolios can be shaped to cater to different price tiers, brands adopting mass-market strategies will enjoy higher cost-effectiveness and be more inclusive as we all work towards a just transition.

Appendix

The magic formula: Big data, AI and analytics

Search and social data are great for exploring leading edge manifestations of change that inform our understanding of consumer trends and expressions. Why? Because when we apply meaningful analytics and AI to them, these big data sources offer real time, unfiltered, global, close to population level details on consumers' needs and desires.

In upcoming reports, we will talk about AI and analytics in more detail, but for now, let's talk about some of the basics.

The power of search as a demand signal

Because there is no one looking over the user's shoulder, search data is mostly unbiased. Anyone who has ever looked at clickstream data can attest to how unfiltered search queries are. With Google at +90% penetration in most countries, it is almost population level data and as such representative. All those who use the web use search. Search is also linked to demand and a good bellwether for the services, products, and needs that people display. We have even seen a clear link between search and demand and now understand how it can predict disease spread, future investing trends, and voter preferences.

Limitations? It is harder to read consumers' emotional needs and link this to profiling (beyond age and gender) and it is less contextual than social (we do not always know why consumers have a specific need).

The power of social to contextualize jobs to be done

Social provides in-the-moment context about our attitudes, lifestyle, and needs. It helps us understand why, when, where and how consumers are solving specific problems or jobs to be done within a category. It provides the richness of answering questions like: Do they use a certain ingredient to detox or relax? Is it for them or someone else? Is it for morning or evening use?

Limitations? We can't get close to population-level data (which can make it harder to identify niche or disruptive trends) and the data has social desirability bias (consumers are unlikely to share socially unacceptable behaviours or thoughts).

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TOP 15 MAINSTREAM TOPICS OF INTEREST
RANKED BY VOLUME ACROSS 10 MARKETS

	AVG. MONTHLY INTEREST	24M GROWTH
Waste	23m	52%
Health care	18m	15%
Recycling	12m	7%
Solar energy	11m	241%
Waste container	10m	148%
Electric vehicle	9m	726%
Inflation	8m	741%
Remote work	8m	563%
Minimum wage	6m	50%
Soybean	6m	75%
Climate change	6m	777%
Landfill	6m	35%
Solar power	6m	128%
Tax credit	5m	63%
Packaging & Labeling	5m	101%

TOP 15 DISRUPTIVE TOPICS
RANKED BY GROWTH ACROSS 10 MARKETS

	AVG. MONTHLY INTEREST	24M GROWTH
Environmental, social and corporate governance	1m	2231%
Inflation	8m	741%
Electric vehicle	10m	726%
Remote work	8m	563%
Circular economy	142k	545%
Biodiversity	942k	463%
Green bond	53k	445%
Disposable product	5m	393%
Carbon footprint	481k	366%
Occupational burnout	1m	361%
Natural gas prices	259k	334%
Hybrid electric vehicle	745k	307%
Alternative energy	54k	303%
Renewable energy	2m	293%
Microplastics	231k	280%

Contact us

**Discover what others cannot.
At speed, with scale.**

We use big data (search and social), AI and analytics to allow you to predict and inspire growth by gaining insights from all markets, all languages, your own category and adjacent categories in less than a week.

For more more information or questions on this report, please visit kantar.com or contact:

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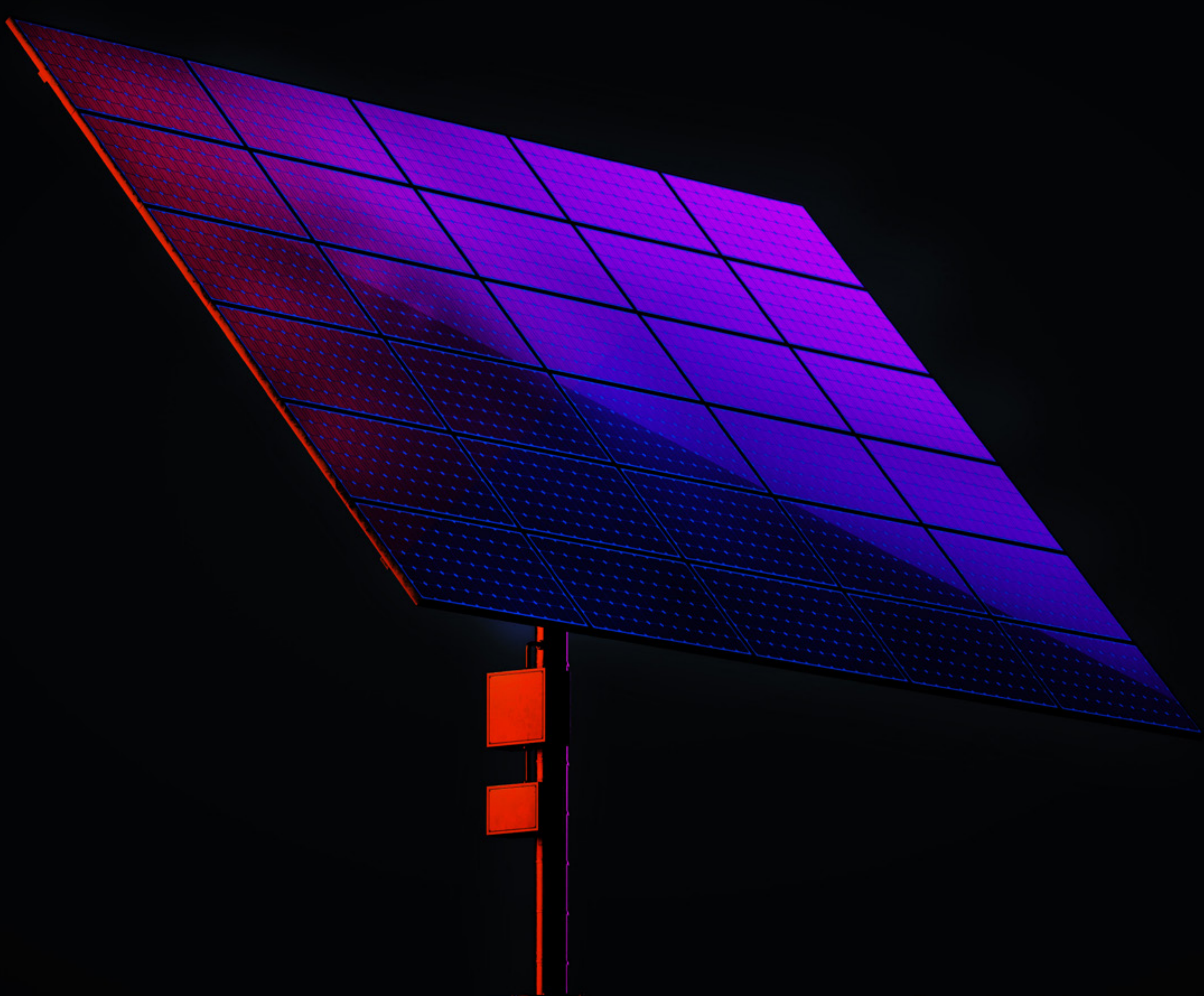

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About Kantar
Kantar is the world's leading marketing data and analytics company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks and our innovative analytics and technology, we help our clients understand people and inspire growth.