

KANTAR

Insights to driving sustainable behaviour change

S U S T A I N A B L E
T R A N S F O R M A T I O N



Kantar on sustainable transformation

Forbes

“Kantar:
one of the
world’s best
sustainability
consultancies

[LinkedIn](#)



Partnerships



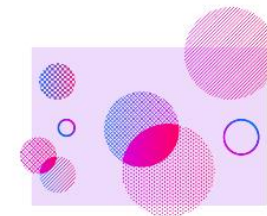
Thought Leadership



SUSTAINABILITY
SECTOR INDEX



WCWD? 2023



BRAND INCLUSION
INDEX



Client ready case studies

A sunset over a beach with a path of stepping stones leading into the water. The sky is a mix of orange, pink, and purple, and the water is calm, reflecting the colors. The stepping stones are dark and arranged in a line that recedes into the distance.

Bridging the Value-Action Gap

01 With disruption comes opportunity

02 But there's a problem...

03 Creating meaning through Responsibility

04 Inclusion = expansion

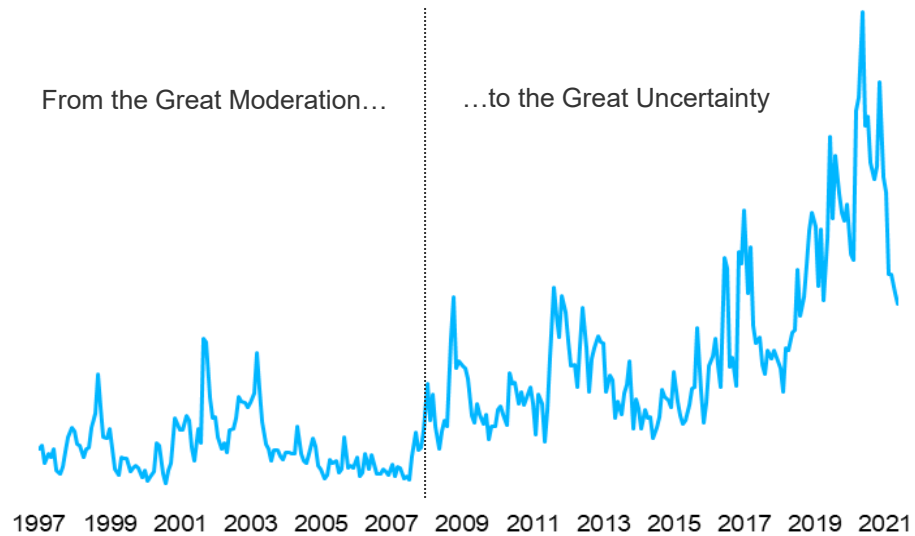


1
With disruption comes
opportunity

Disruption is the **new normal**

The Great Uncertainty

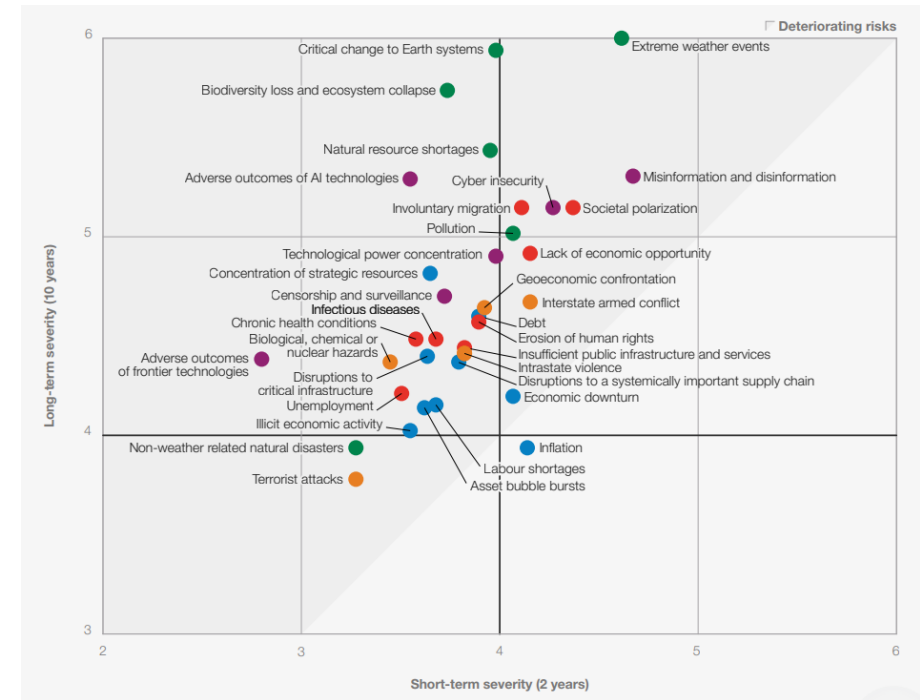
Global Economic Policy Uncertainty Index



<https://www.policyuncertainty.com/index.html>

Fueled by climate change

Relative severity of risks over a 2- and 10-year period



[WEF_The_Global_Risks_Report_2024.pdf \(weforum.org\)](https://www.weforum.org/reports/WEF-The-Global-Risks-Report-2024)

Businesses are facing existential risk in an era of disruption

“ If some companies and industries **fail to adjust to this new world, they **will fail to exist** ”**

Mark Carney

UN Special Envoy for climate action and finance,
Former Governor of Bank of England & Canada

Pressure from all stakeholders: not least citizen consumers

Demand for business responsibility



74%

I believe businesses have a responsibility to make society fairer.

Demand for climate action

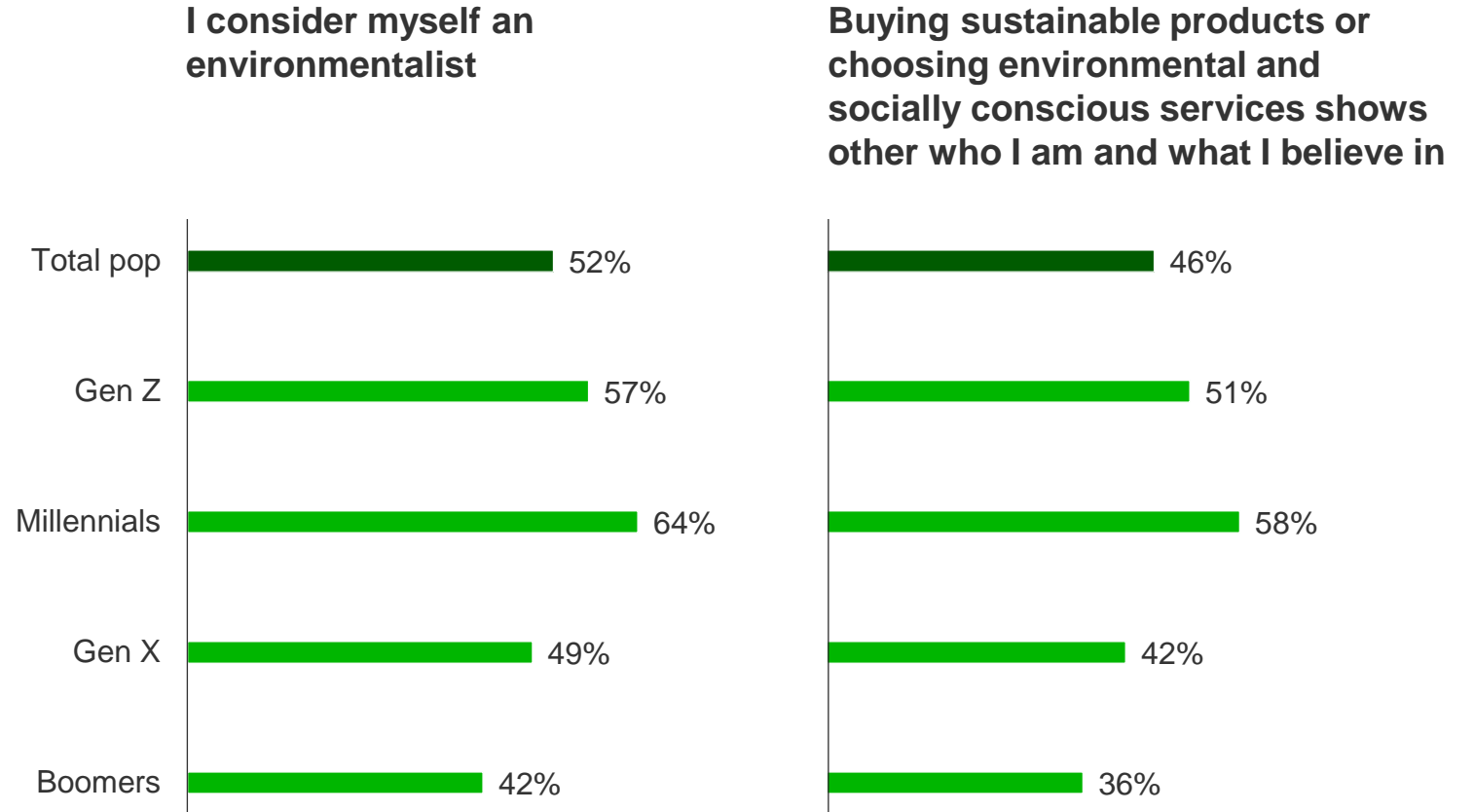


64%

Say it is businesses' responsibility to solve climate and environmental issues.

Especially true for younger cohorts

For many GenZers and Millennials, sustainability is a core part of who they are.



Sustainability value contribution to brands is growing significantly

Sustainability contribution to value of Global BrandZ Top 100

\$193B

Over 10 years, endorsements of sustainability perceptions have risen


84%

Sustainability remains the most important driver of corporate reputation, contributing

45%

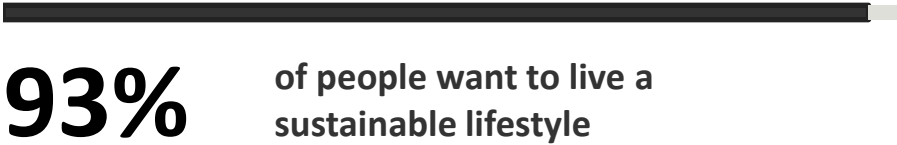
YOY growth of brands rating highest on BrandZ Sustainability Index

31%

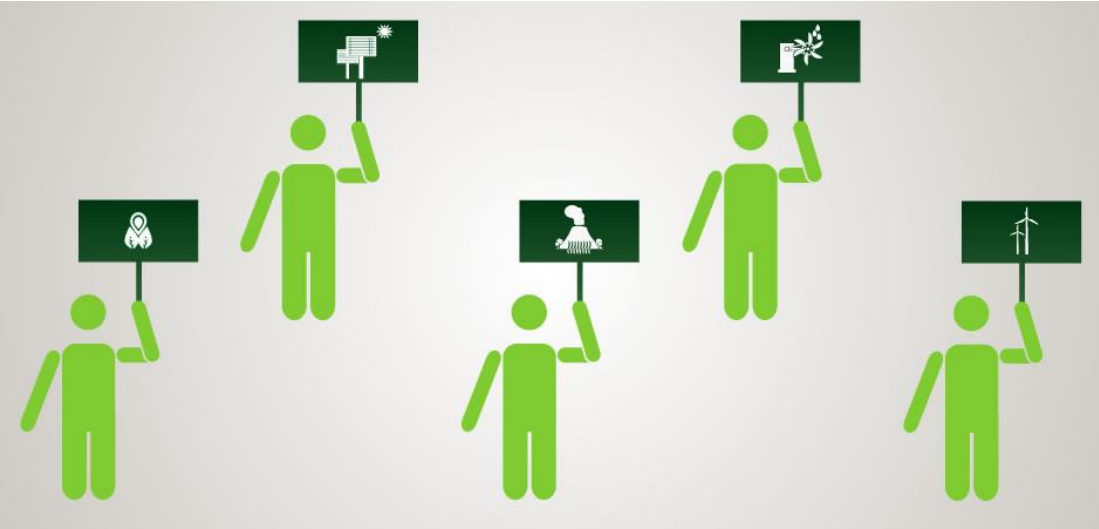
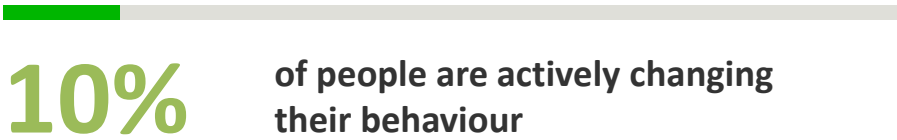
A woman with dark hair tied back, wearing glasses, is looking upwards and to the right. She is illuminated by a mix of blue and red light, creating a dramatic, high-contrast effect. The background is dark with some blurred light spots.


2 But there's a problem

The Value-Action Gap



But only...



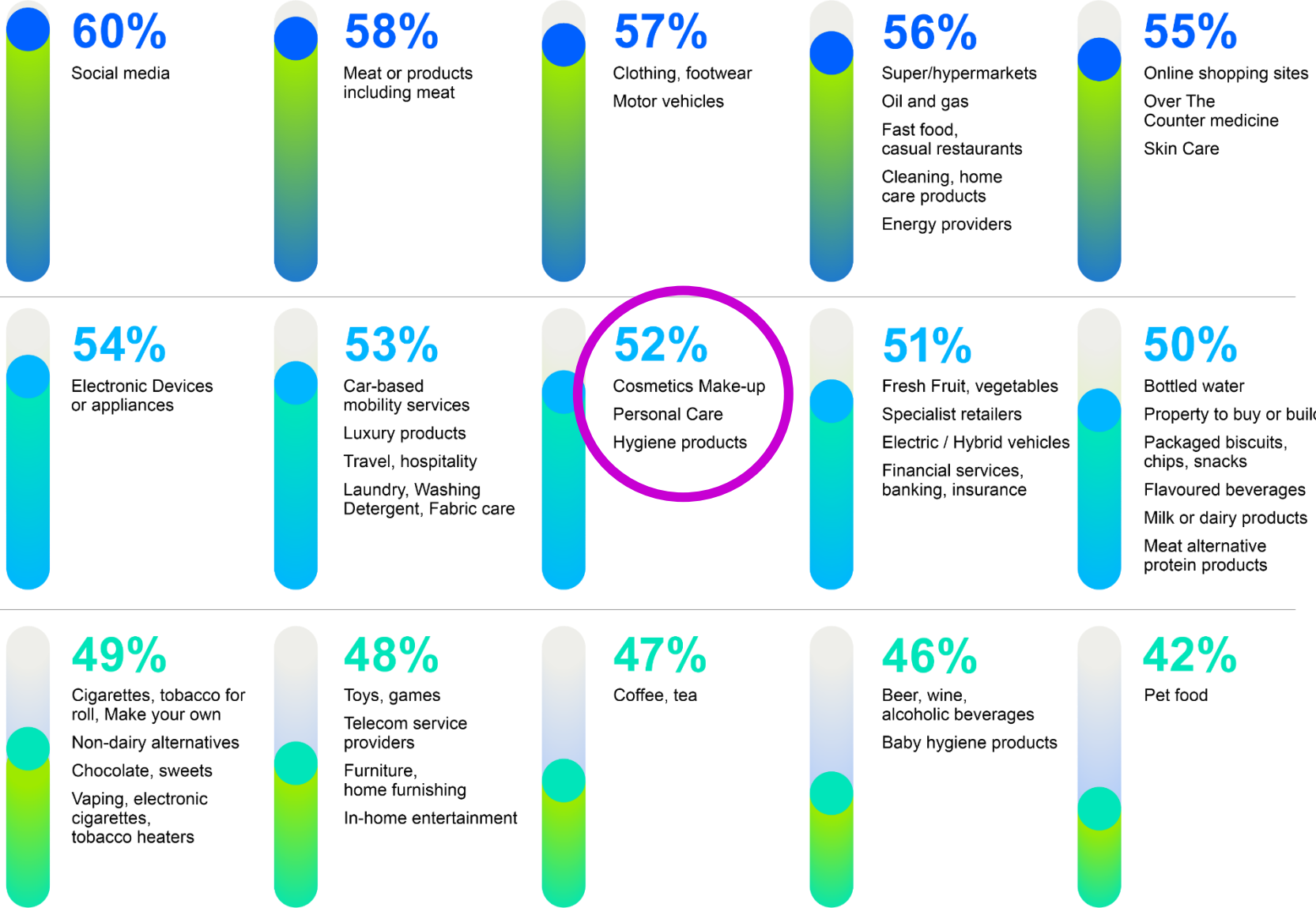


70%

expect to personally feel the effects of climate change in their lifetime. 63% already feel personally impacted.

61%

globally say they pay a lot of attention to environmental and/or societal issues in the news.



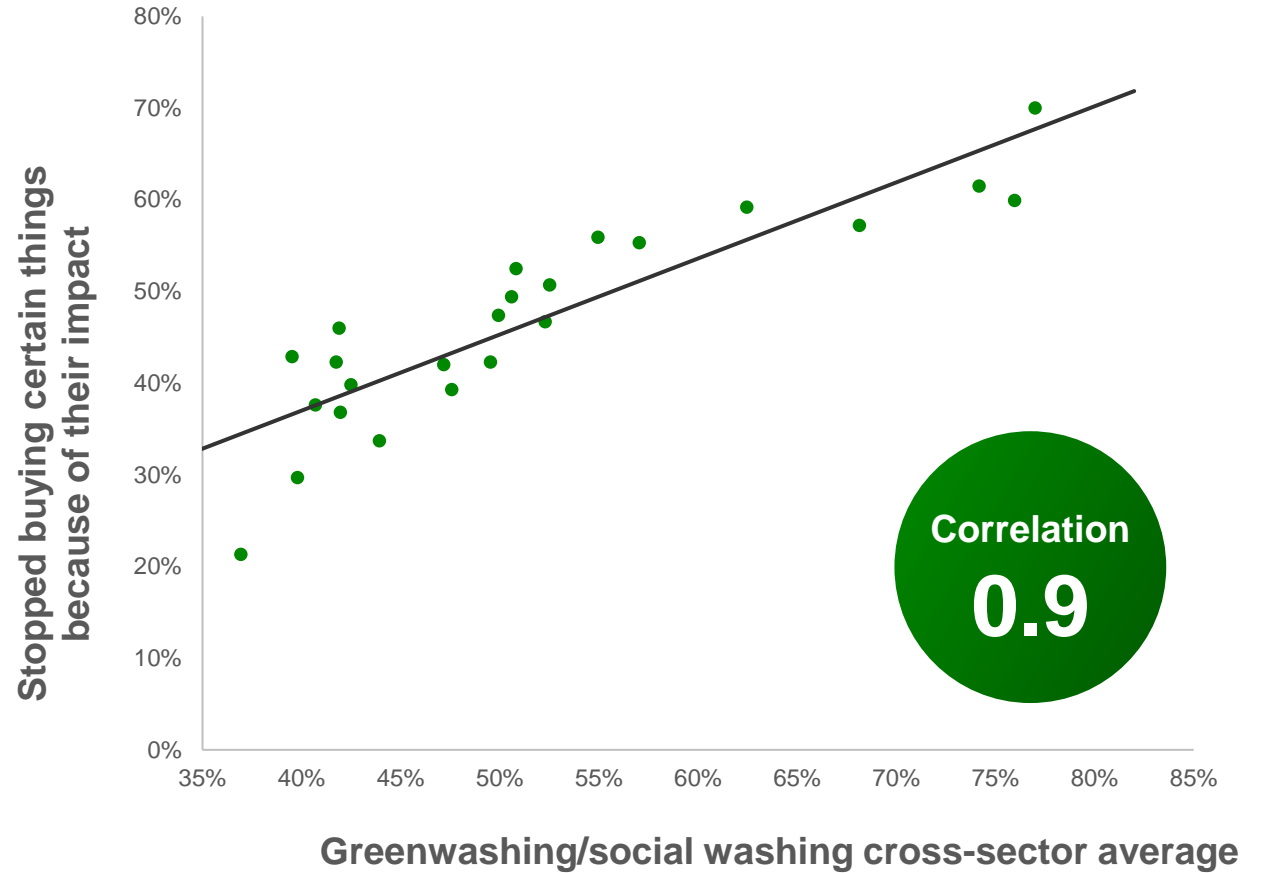
HIGH LEVELS OF GREENWASHING

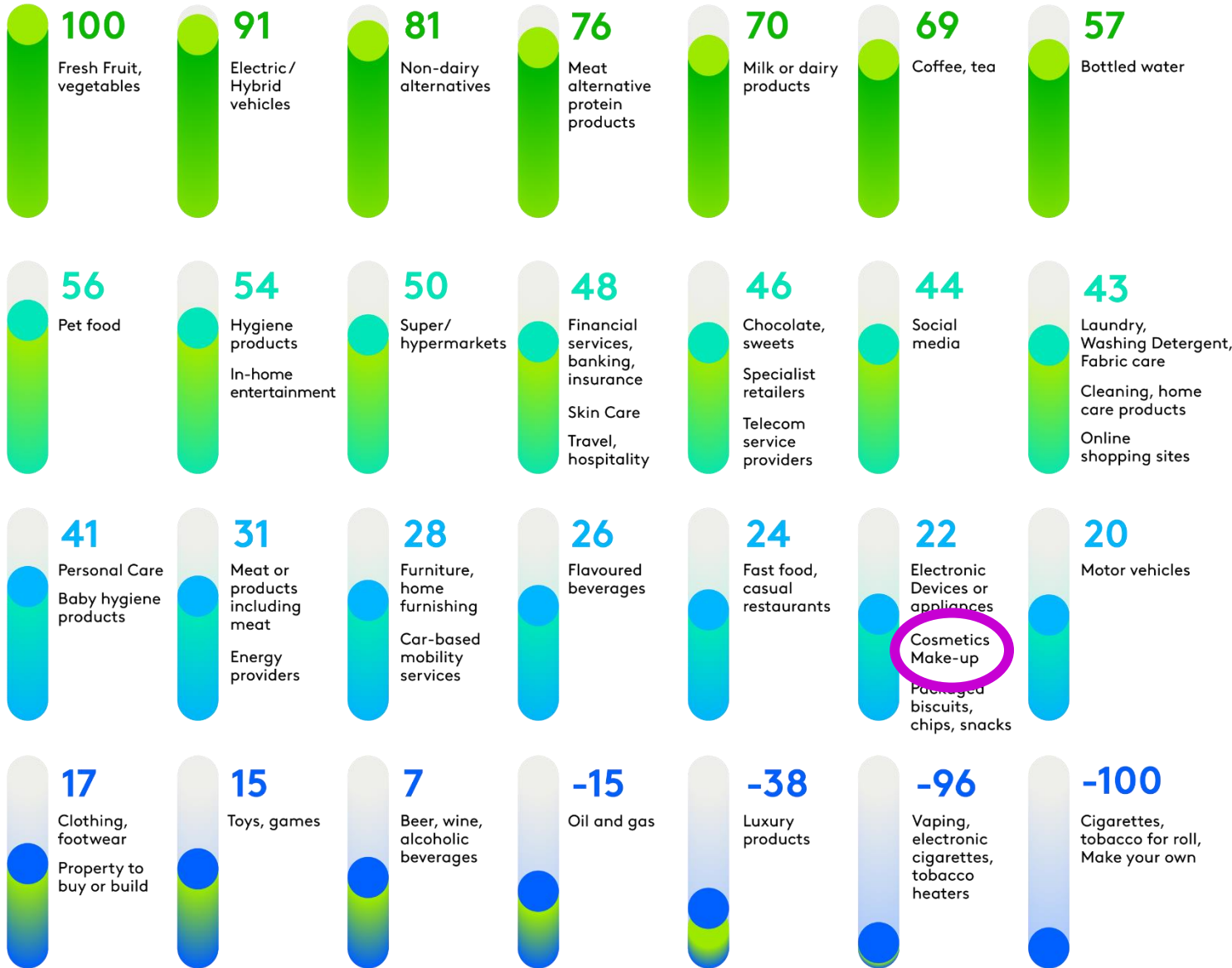
On average,

52%

of people say they have seen, or heard, false or misleading information about sustainable actions taken by brands

Losing trust has commercial consequences



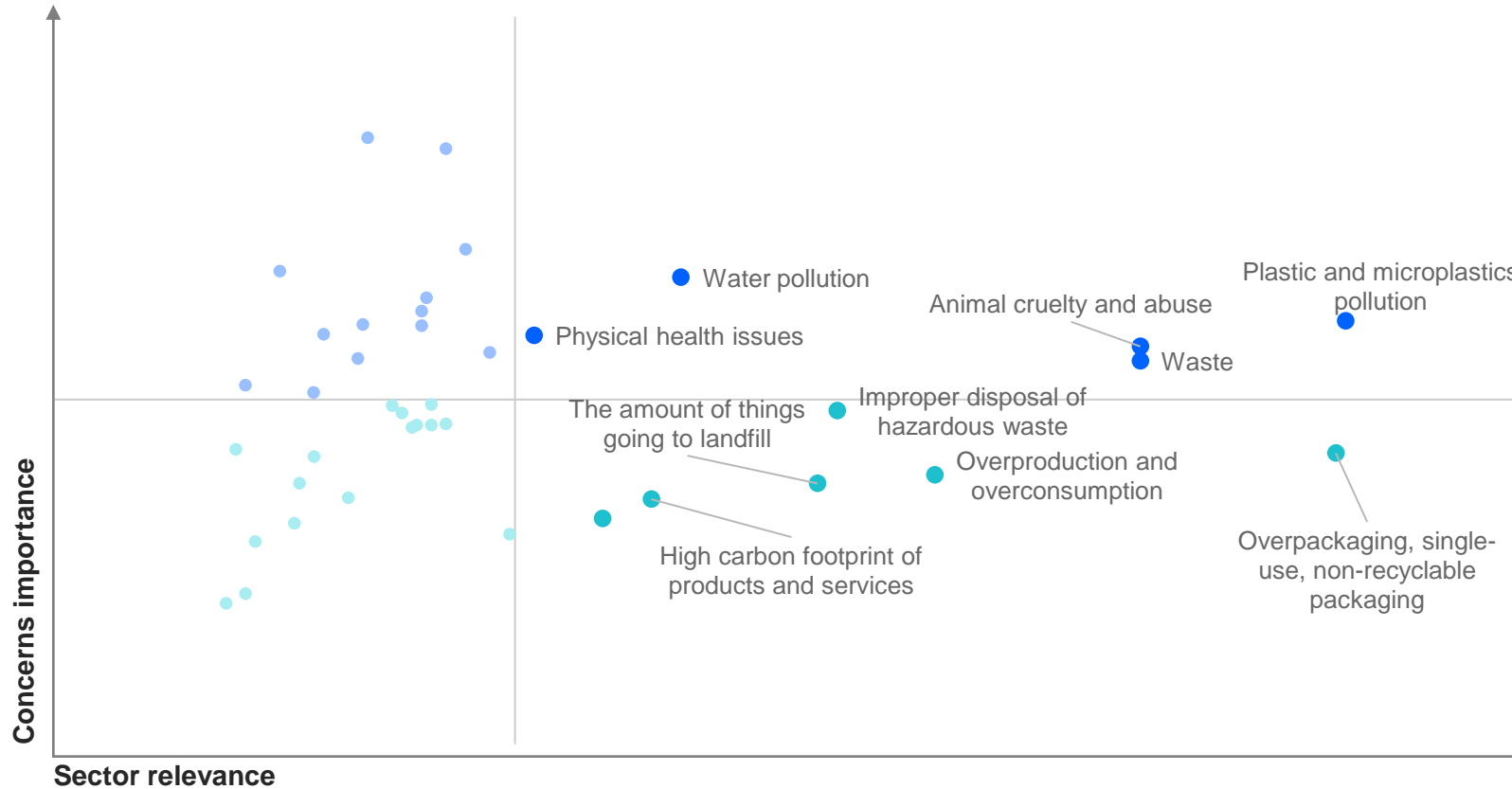


GLOBAL SUSTAINABILITY SECTOR INDEX RANKING

Cosmetics:

- Need stronger connection
- Opportunity to stand out by addressing strengths and weaknesses

Cosmetics Make-up



#2 PRIORITY

Once the shields are leveraged, these drivers can then further differentiate moving forward (potentially setting trends).

#1 PRIORITY

Without these, the brand does not meet fundamental consumer expectations.

Responsible business examples

Circularity (*Wild*)



Waterless Beauty (*Ethique*)



Vegan Beauty (*Milk*)



Microbial Beauty (*Mother Dirt*)



Skinimalism (*Glossier*)



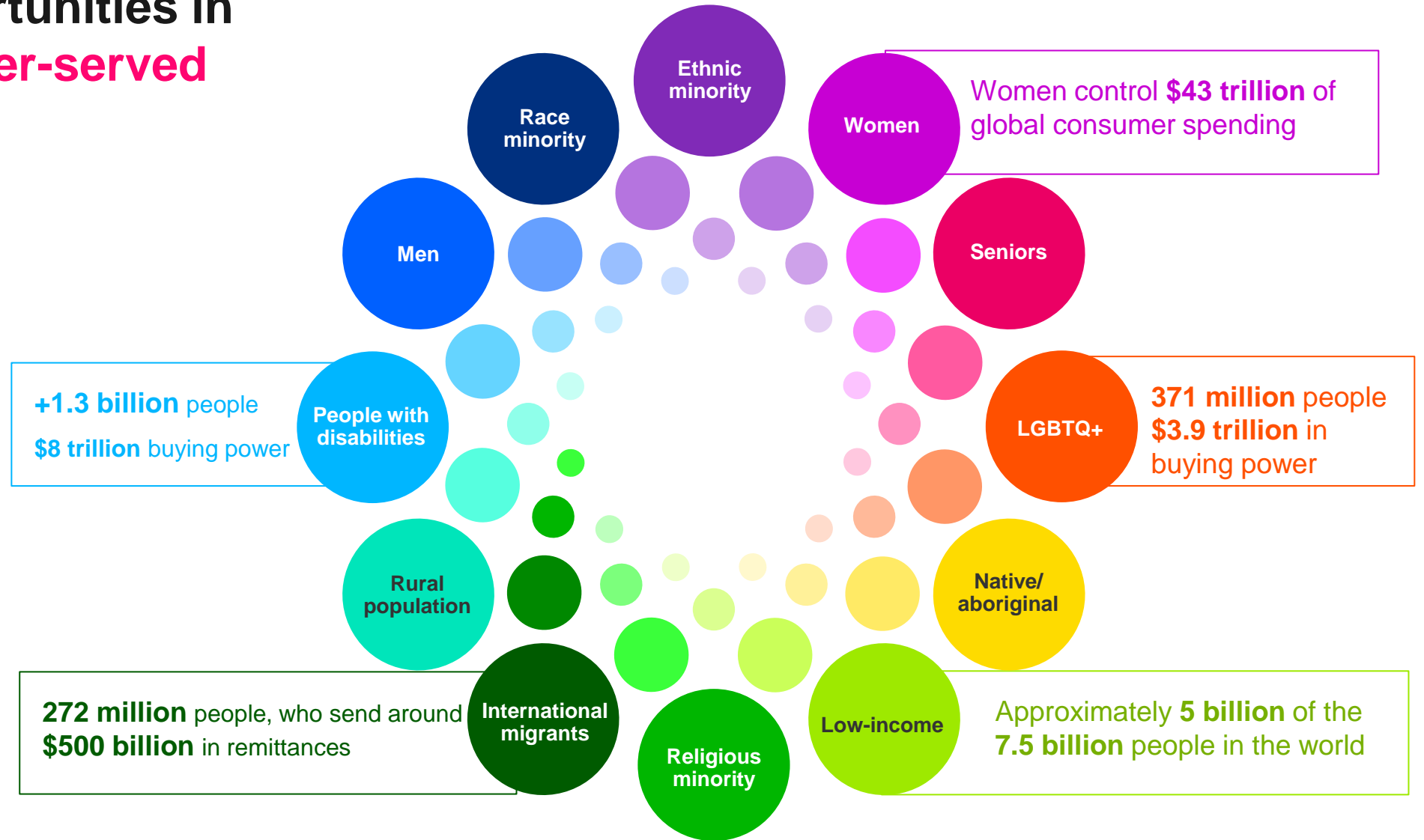
Blue Beauty (*La Mer*)



4

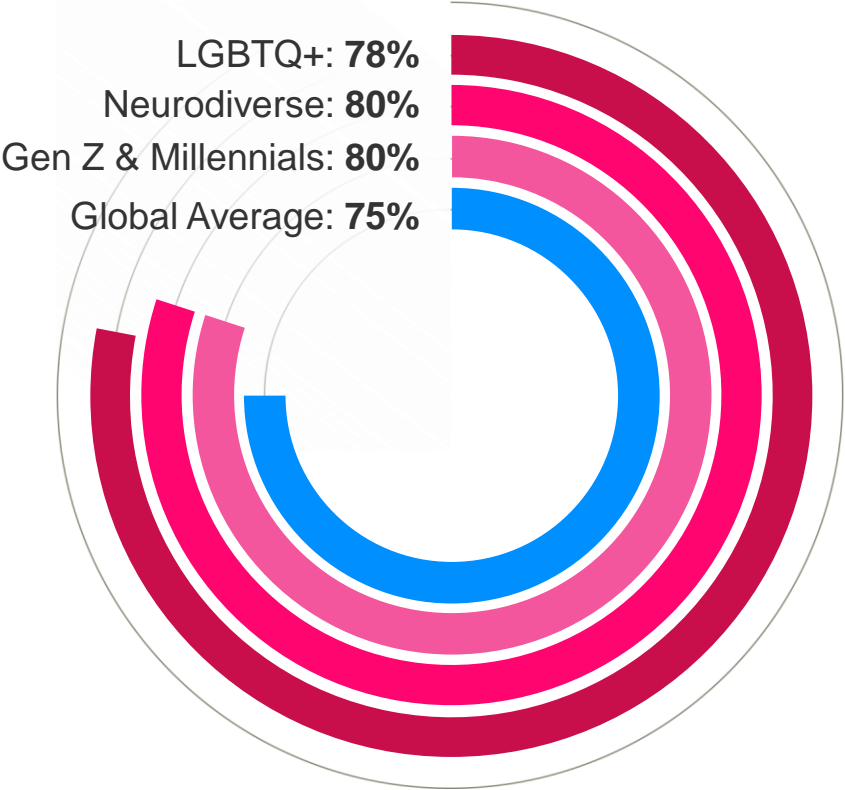
Inclusion = expansion

Significant opportunities in high-growth under-served populations...



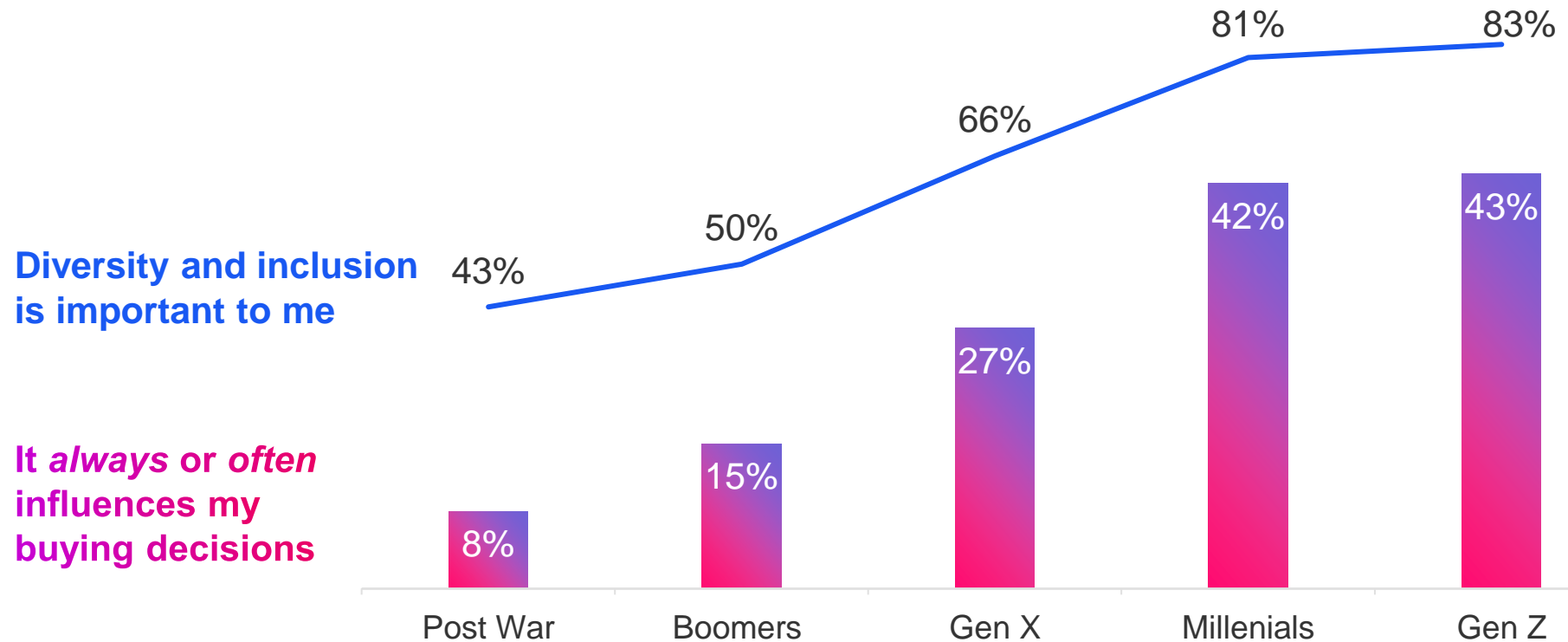
Diversity and inclusion drive purchase decisions among almost 8 in 10 people worldwide

“It is important to me that the companies I buy from actively promote diversity and inclusion in their own business or society as a whole.”



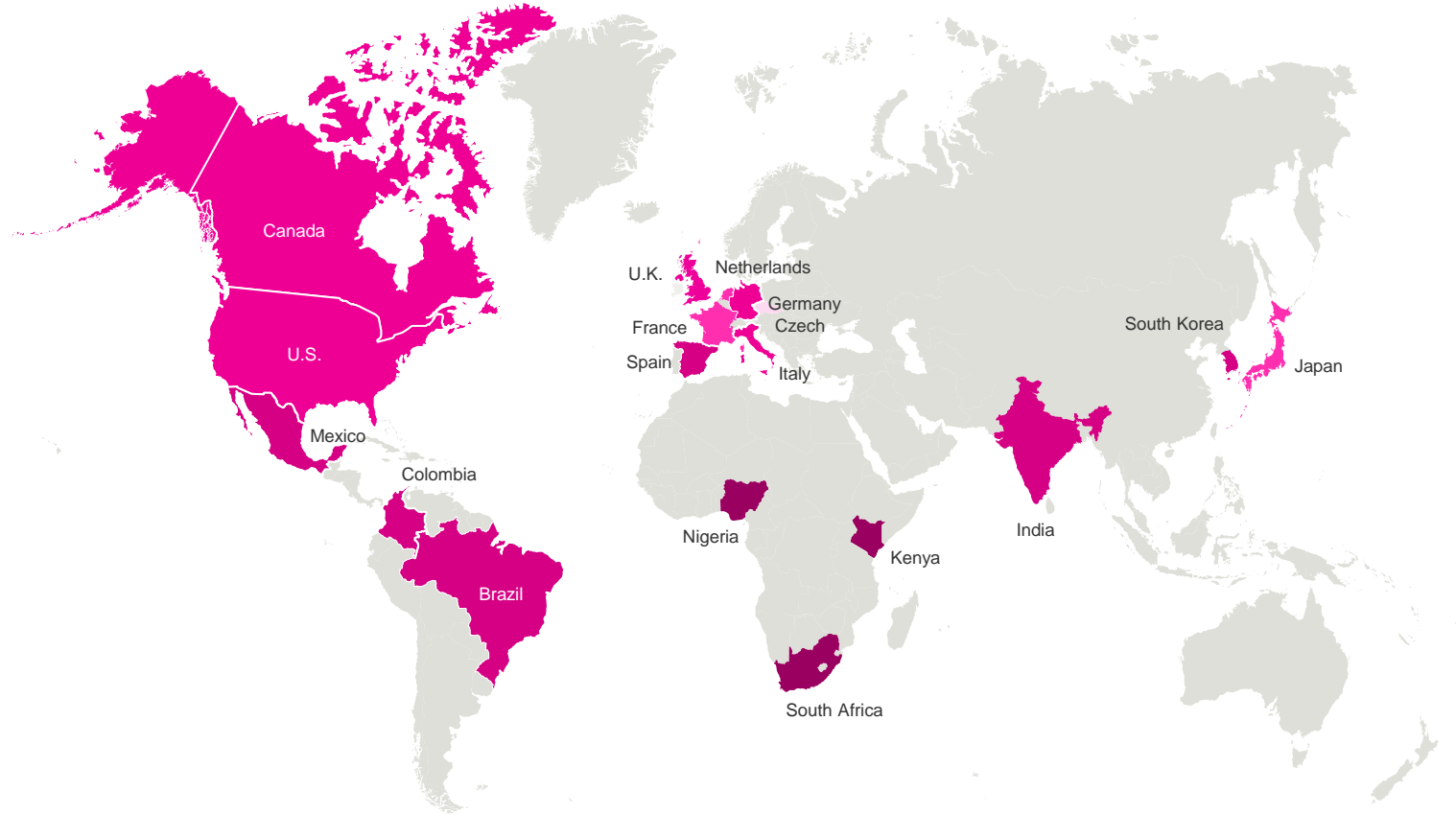
A generational shift is shaping the culture and brand expectations

For Gen Z and Millennials, diversity and inclusion are driving values that influence how they see brands and how they make buying decisions, not just occasionally, but **constantly**.



DEI is key for emerging majorities around the world

Kenya	96%
South Africa	94%
Nigeria	91%
Brazil	88%
India	86%
Colombia	85%
Spain	83%
Mexico	83%
South Korea	82%
Canada	79%
United States	79%
Italy	78%
United Kingdom	78%
Germany	77%
France	68%
Netherlands	67%
Japan	65%
Czech	49%



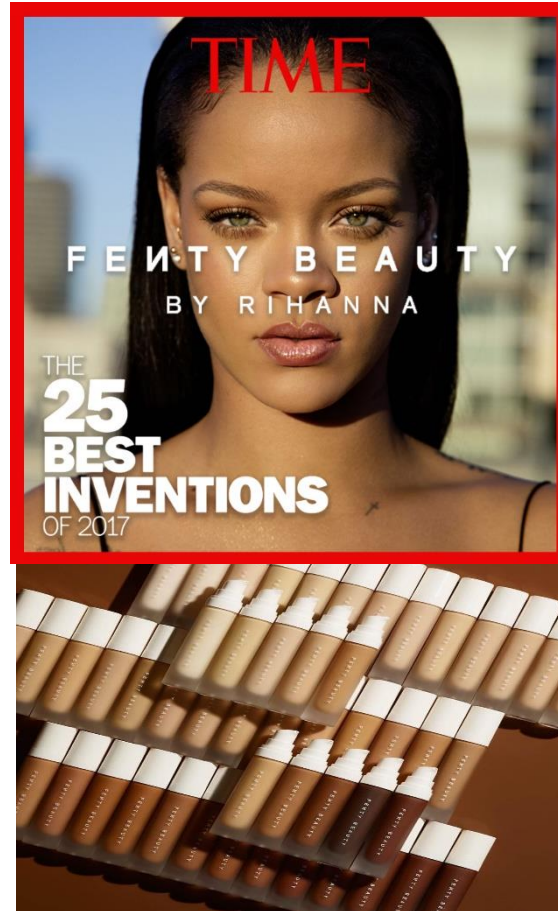
DEI is key for emerging majorities around the world

50 Inclusive shades as of 2024

Black brands make up only 2.5 percent of revenue in the beauty industry. Yet Black consumers are responsible for 11.1 percent of total beauty spending. - McKinsey



”



Fenty

“

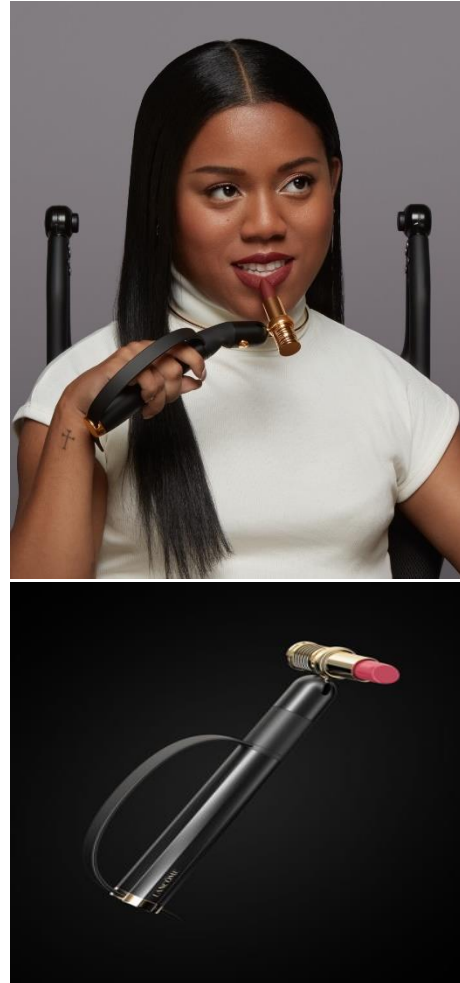
More than just makeup, it's a mission with a vision, serving foundation that put every tone on the map. Launching color that created new ways of being and seeing with loaded pigments and freestyle formulas – Fenty

DEI is key for emerging majorities around the world

“

Only 4 percent of beauty and personal care brands create products that cater for disabilities - Procter & Gamble found in 2019 research.

About 15% of the world's population lives with some form of disability - WHO



“

HAPTA is designed for those with hand-motion disorders. This motion-stabilizing device harnesses the power of technology to assist those who have difficulty raising their arms due to limited mobility issues, and people with limited grip strength who struggle with precise application.

Finishing on a **positive**

Tipping point

25%



KANTAR

**Thank you !
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