

WHO CARES? WHO DOES?

Is inflation stalling
the green momentum in FMCG?

Issue 4 | September 2022





Challenging times in a changing landscape

The spotlight may not be on the climate, but the time is now for brands to act.



Natalie Babbage
Global LinkQ Director
Worldpanel Division | Kantar

Welcome to the fourth edition of Who Cares? Who Does? The world has come a long way since its first edition. When we started this report in 2019, plastic waste was high on the media agenda, and the ‘Blue Planet’ effect was in full force.

When we look at the landscape today, the issue might not be as visible in the press, but we have a core group of 18% of the population for whom reducing their waste is a firm habit – we call this group Eco Actives. There has been a proliferation of choices for refills, recycled, and recyclable plastic packaging. We see meat alternatives in stores in European markets, and more local, natural, and organic products in Latin America, attracting our most environmentally conscious shoppers. Government legislation in the EU has banned many single use plastic items and some markets,

like France, are going further, with a wider range of banned products.

But what we see here is also a mixed story. Our most environmentally conscious group has declined when compared with the figures during the pandemic, driven by other concerns such as war and financial issues taking precedence. Stalling momentum in the green space from brands and governments is also not making environmentally conscious living as accessible and prominent as it should be. But this group presents a huge financial opportunity for brands, and we still project that numbers of Eco Actives will increase over the next five years.

Despite the number of Eco Actives falling, they are still worth \$376 billion to the FMCG industry.

They also remain the group of shoppers most supportive of new brands and formats in the green space and are likely to be early adopters of any initiatives being launched.

However, there is still a long way for brands and retailers to go in helping shoppers make sustainable choices. People are still being asked to compromise in terms of quality, price, and convenience – and in many countries and categories there are no real green alternatives. Getting the equation right to help close the value-action gap is ever-more critical, as economic concerns get more pressing for consumers.

In the next few chapters, you will discover

1

How the global population stacks up in terms of actions on sustainability. You will see how attitudes have changed and the factors impacting consumers'

2

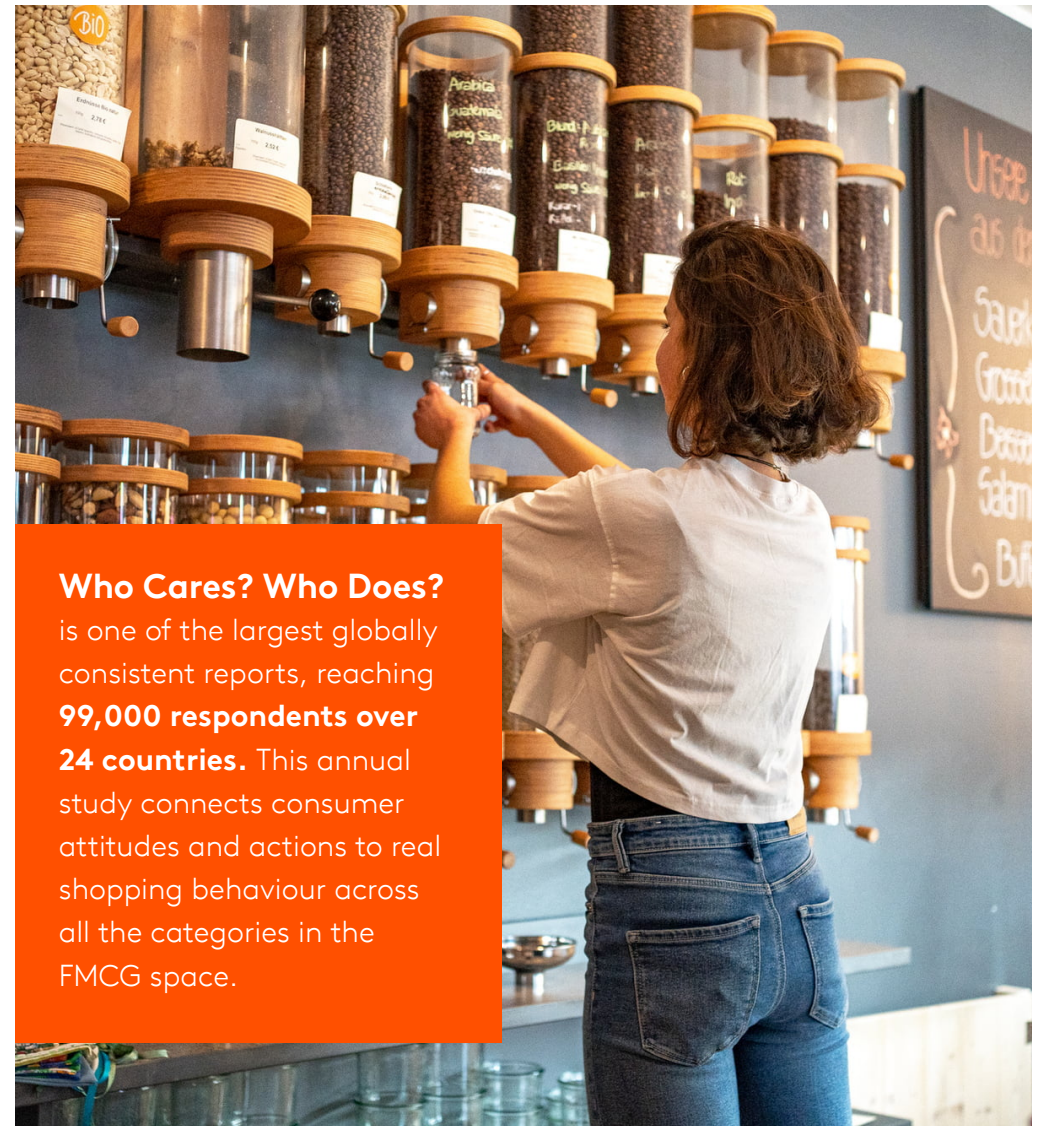
The large and growing opportunity that environmentally conscious consumers offer, and the vast unmet needs of this group

3

How sustainable products are evolving – and which brands are winning out

4

What brands can be doing to truly make a difference and see long-term success.



Who Cares? Who Does?

is one of the largest globally consistent reports, reaching **99,000 respondents over 24 countries**. This annual study connects consumer attitudes and actions to real shopping behaviour across all the categories in the FMCG space.

How we do it

Who Cares, Who Does is a globally harmonised survey across 24 markets on our household purchase and usage panels.

MARKETS



Belgium, Brazil, Chinese Mainland, Colombia, Central America, Chile, Czech Republic, Ecuador, France, Germany, Great Britain, Hungary, India, Ireland, Italy, Mexico, Netherlands, Peru, Philippines, Poland, Portugal, Slovakia, Spain and the US.

SAMPLE



>99,000 respondents

FIELDWORK



Took place between
May - June 2022



Who Cares? Who Does?
is a joint initiative between
Worldpanel division, Kantar, Europanel and GfK



How has the population shifted?

See how we categorise the population – and how world events have led to changing attitudes and priorities across the globe.

Sorry, you must sign up in the [online version](#) to view this content.



The Eco opportunity

Eco Actives are a huge market that brands are under servicing. But how big is the opportunity? And is it worth the investment?

Sorry, you must sign up in the [online version](#) to view this content.



Prioritising product: how sustainable offerings are evolving

We have already seen how spending habits are changing. But how can brands use affordable, high-quality products to leverage the value-action gap and give shoppers a reason to buy?

Sorry, you must sign up in the [online version](#) to view this content.



Creating a
competitive
advantage - the
time to act is
now

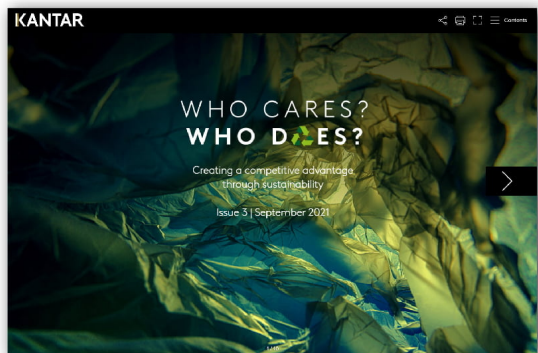
Sorry, you must sign up in the [online version](#) to view this content.



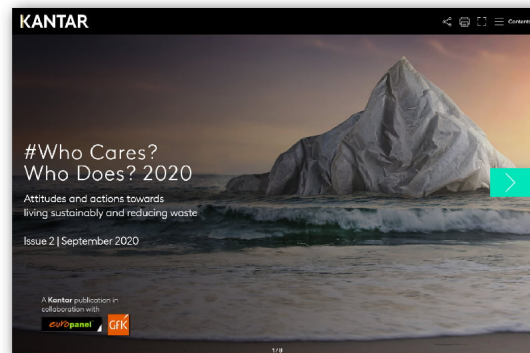
Food for thought

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

Food for thought



Who Cares? Who Does?
2021



Who Cares? Who Does?
2020



Who Cares? Who Does?
2019

For more information, including
local market or category-specific data,
please contact

Natalie Babbage
Natalie.Babbage@kantar.com
Global LinkQ Director
Worldpanel Division | Kantar

