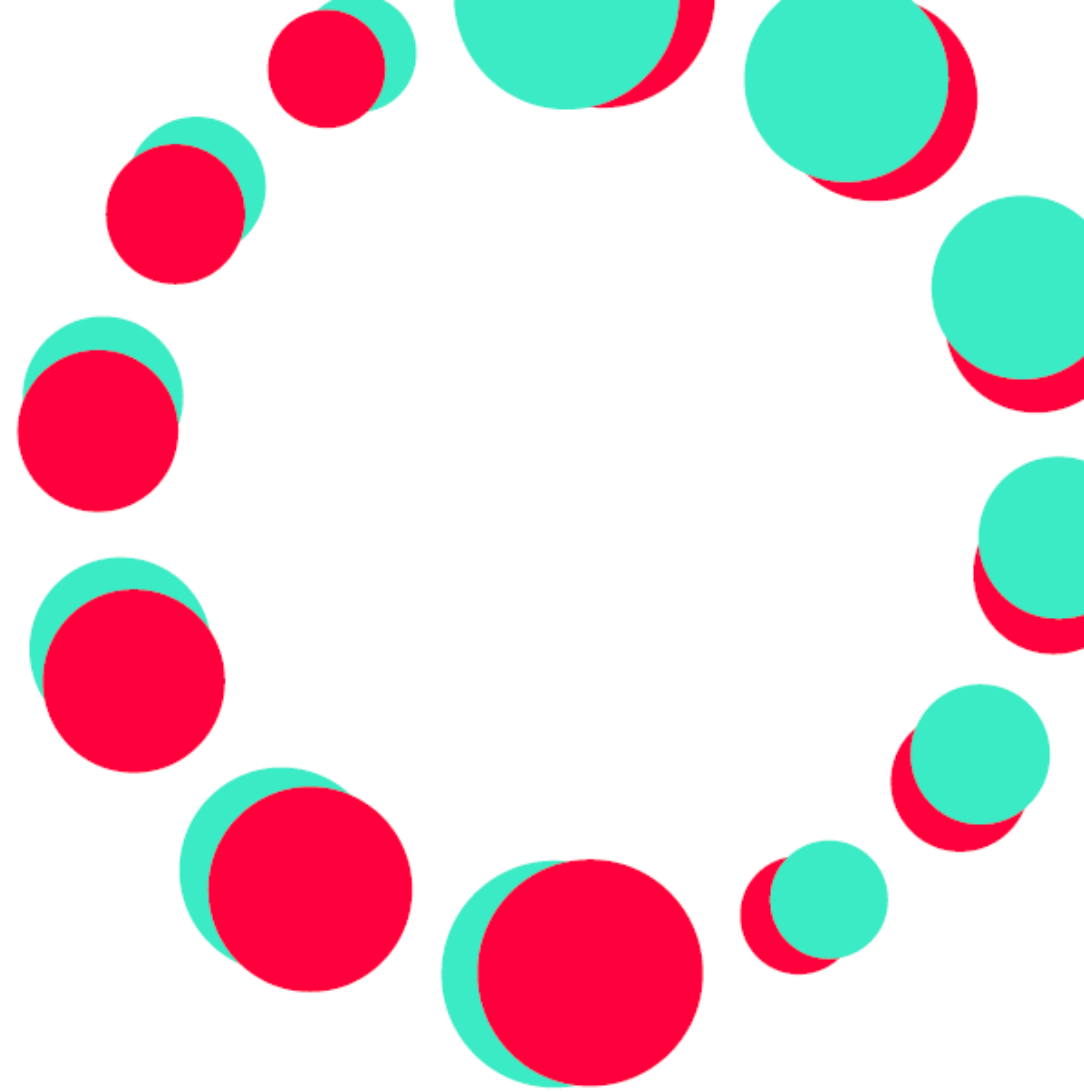




Sustainable *marketing 2030.*

“A sustainable growth framework for marketing”

Deep-dive regional report: Benelux



Agenda

- Introducing this report
- An overview of the global results
- Benelux regional deep-dive results
 1. Setting the sustainability context
 2. Progress on the sustainability journey
 3. Sustainability performance across marketing levers
 4. Sustainability leadership
 5. Key learnings

Introducing this report

Methodology overview

In partnership with our national association members and **Kantar Sustainable Practice**, **WFA** conducted a new global initiative, building on the insights from the 2021 research, measuring progress and what gaps are still to be addressed: **Marketing and Sustainability: Closing the Gaps**.



30

In-depth, qualitative interviews with leading CMOs and thought leaders



44

National associations engaged in delivering a truly global perspective, covering **48** countries



938

Online survey responses from senior marketers (client-side) across the globe

Leaders and experts who informed this initiative.



Conny Braams



Cheryl Goh



Cristina Diezhandino



Raja Rajamannar



Johan Wickmark



Arjan Dijk



Fabrice Beaulieu



Lex Bradshaw-Zanger



Feyza Tamer



Clara Lee



Ponz Pandikuthira



Kresse Wesling CBE



Jane Wakely



Chris Leong



Mark van Iterson



Preeti Srivastav



John Schoolcraft



Charmian Love



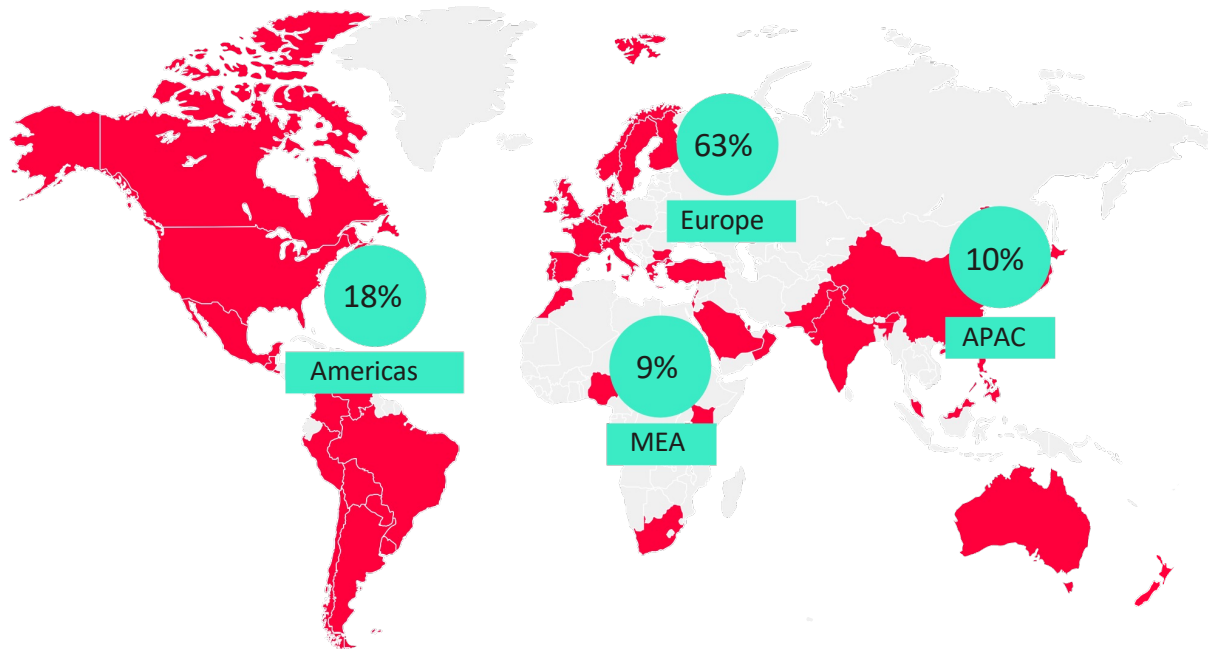
Our global community.



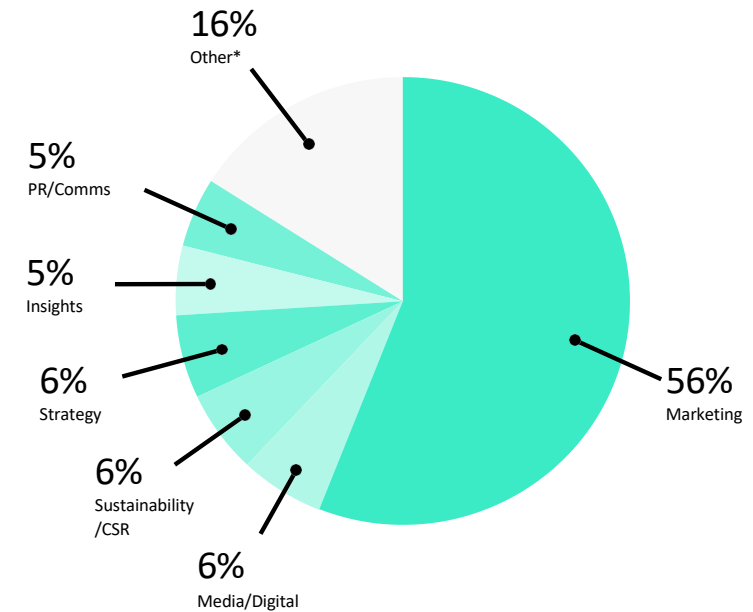
Who did we interview?

Global quantitative sample.

Respondent split across the world.



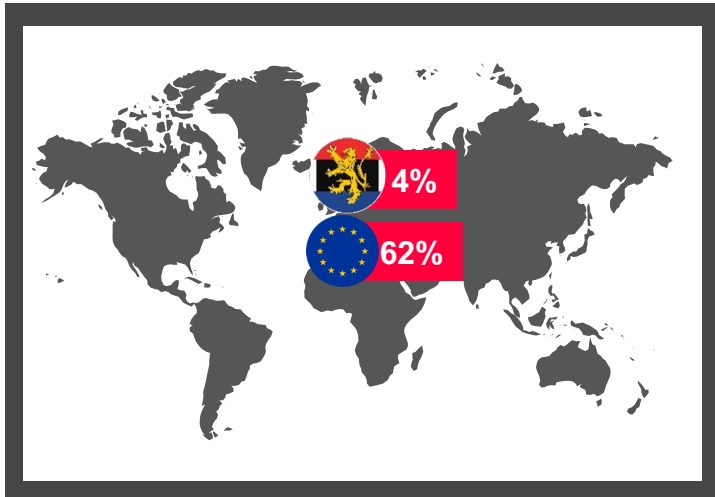
Respondent split across functions.



*Other includes Marketing procurement/Sourcing, Public/ government/external affairs/ Sales/eCommerce and Other and were not represented individually as they represent less than 5% of the answers

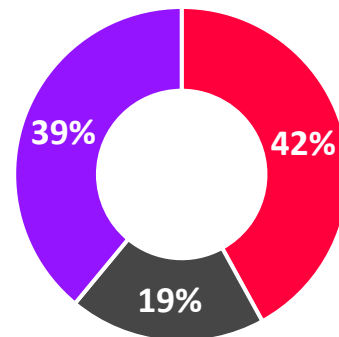
Who did we interview?

Sample profile (at company level)



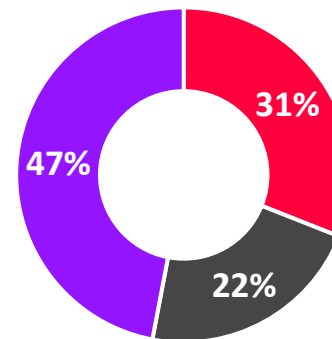
Calculated out of total sample

Business Focus



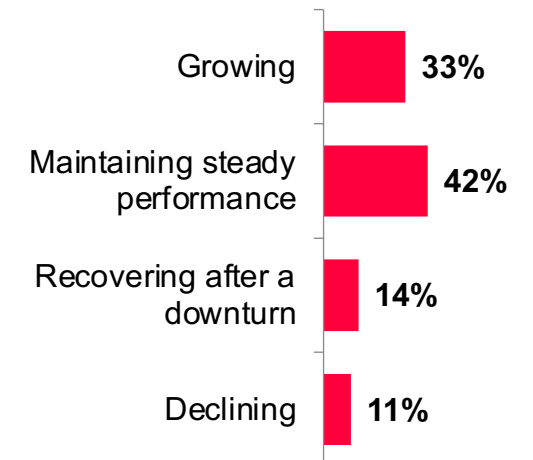
- Business to Consumer (B2C)
- Business to Business (B2B)
- Both

Company size (by no. of employees)

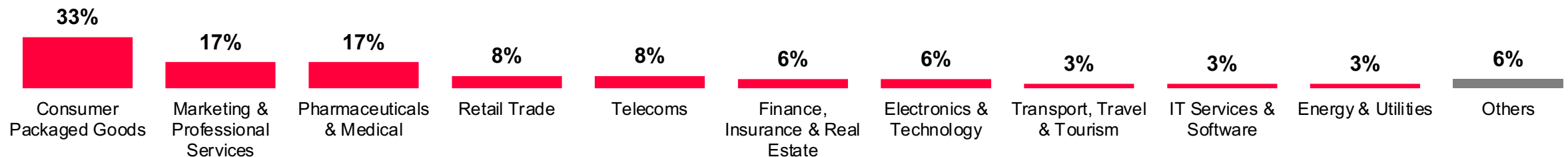


- Small (< 1000 empl.)
- Medium (1000-5,000 empl.)
- Large (> 5,000 empl.)

Current business performance



Company sector

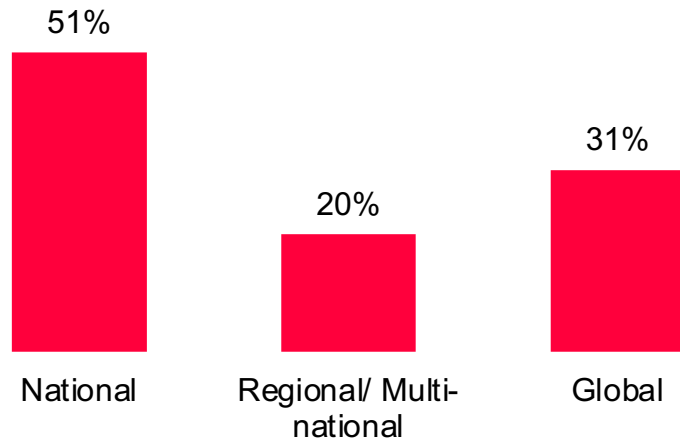




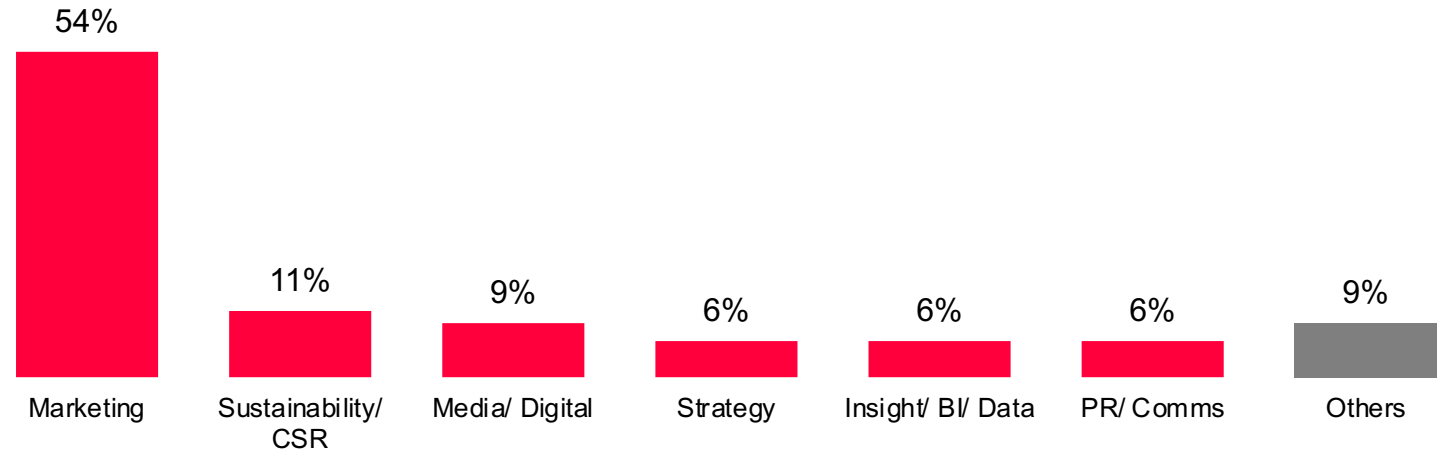
Who did we interview?

Sample profile (at respondent level)

Respondent's remit (multiple choice possible)



Business roles



How to read the norms

This report illustrates the results at 3 levels:

- Benelux regional deep-dive (🇧🇪)
- Europe norm (🇪🇺)
- Global norm (🌍)



How are the differences highlighted?

Where the results in Benelux are statistically significant higher/ lower than the Global (or regional) norm, the % is highlighted by arrows, as following:

↑↓ Arrows indicate a regional/ global significantly higher / lower value than Benelux (at Confidence interval 95%)

2021

Where comparable, we have included some references from 2021 data, illustrating through arrows significant changes in 2023 vs 2021.

An overview of the global results

Progress is happening.

Exec involvement

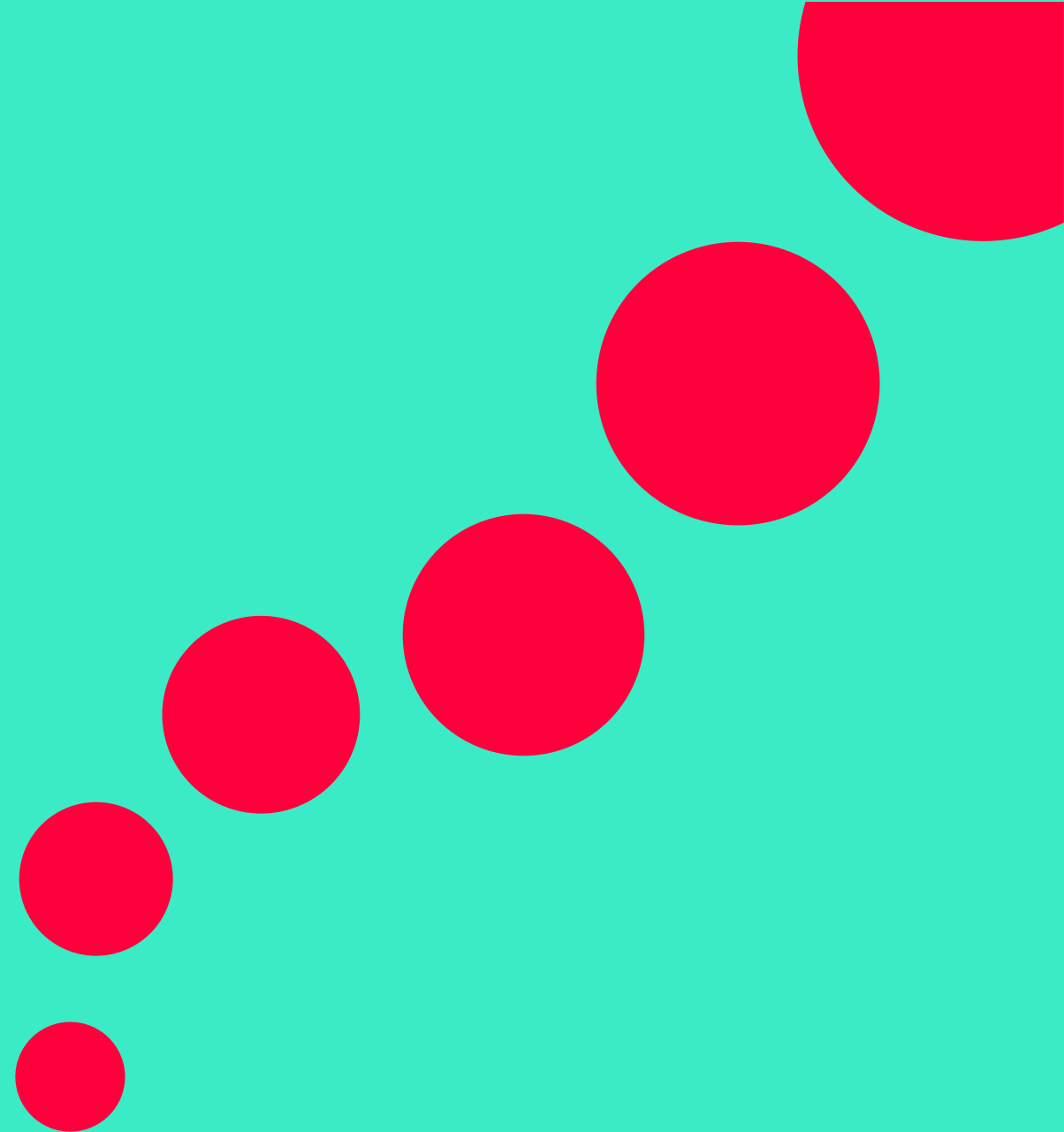
- 87% say the Chief Sustainability Officer reports to CEO/Board vs 80% in 2021

Visibility of KPIs

- Sustainability as a KPI in marketing dashboards increased to 42% in 2023 vs 26% in 2021

Sustainability comms

- 40% say they have a sustainability story and are proud to communicate it versus 25% in 2021



But not fast enough....

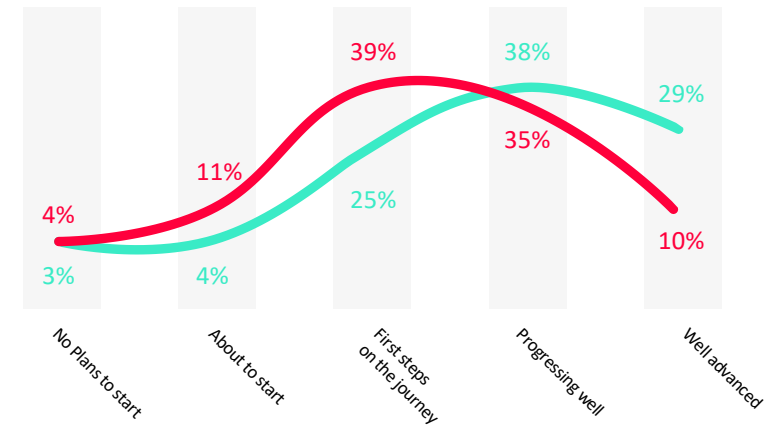
90%

of marketers agreeing that sustainability agendas must be more ambitious

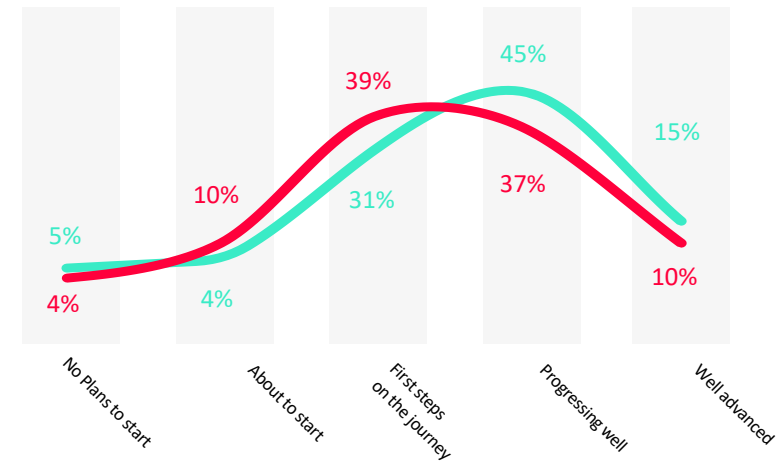
94%

saying marketers need to act more bravely and experiment to drive transformative change

“Marketing and Sustainability: Closing the Gaps” (WFA 2021 report)



“Sustainable Marketing 2030” (WFA 2023 report)



At company level
Marketing function

It's time for marketing to step up.



"We are moved as a species by creativity. Marketers have the ability to take the science and the data, and to move people by connecting them to that information in a meaningful way. Now more than ever, the world needs marketers' creativity, commercial acumen and storytelling. That's what makes our industry part of the solution."

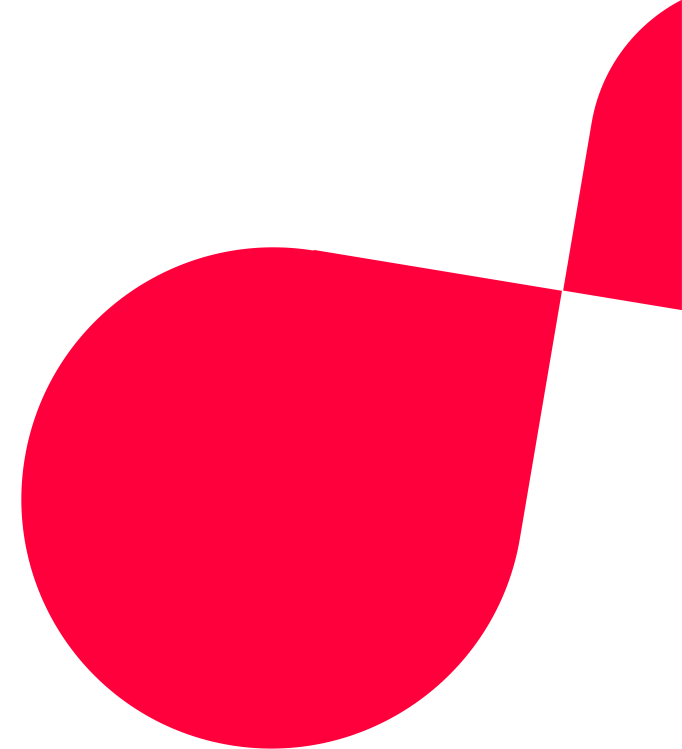
Charlie Thompson, Programme Director – Executive Education,
Cambridge Institute for Sustainability Leadership

It's our responsibility.

93% of marketers say brands have a responsibility to help people live more sustainably (vs. 92% in 2021)

We have the right skills.

93% say marketing can make a difference in the sustainability journey (vs. 95% in 2021)



"Over the last 70 years, we've been creating demand for lifestyles that call for more, more and more. We don't just need to make incremental changes in industry, we have to fundamentally rethink the model and the purpose of our industry. The good news is that's completely within our reach."

Anna Lungley, Chief Sustainability Officer, International Markets, Dentsu



Planet
Pledge

KANTAR

Top opportunities.

Innovate for advantage

Educate people about their choices and actions at mass scale

Transformative partnerships to drive bigger impact

Expand marketing's role in the value chain

Top challenges.

Redefining success

Dedicated resource

Close the (knowledge) gap

Internal mindset

Different themes emphasised across regions.

North America.

Marketing is slightly lagging behind; opportunity to educate internally and externally



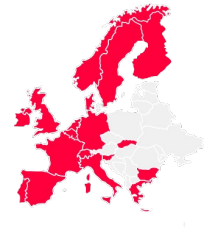
LATAM.

Challenges on conflicting business priorities and building internal confidence



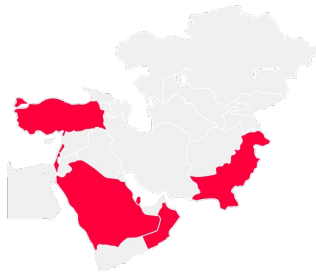
Europe.

Lack of P&L policies and internal resource are key challenges



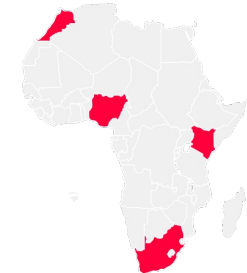
Middle East.

Strong marketing integration; concerns on cross-industry collaboration



Africa.

Positivity and action, but knowledge and skills gap highlighted



APAC.

Premiumisation alongside cost savings are the opportunities; top challenge is sustainability silos



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%

5 key framing principles to drive progress.

1. Sustainability has to transition from a siloed function with stand-alone strategies, to being aligned with core business processes and embedded within marketing practice.
2. Marketing needs to build resilience into the business by committing to transformational innovation that takes future environmental and social impacts into account.
3. Our ability to collaborate will be a key point of difference going forward: within corporations, across functions and with external partners – not least agencies.
4. To avoid charges of greenwashing, and to help consumers change their behaviours, communication has to up the ante on normalising sustainable lifestyles whilst being rooted in value chain reality.
5. How we measure value has to evolve in line with shifting business priorities, to take into account environmental and societal metrics as well as financial.



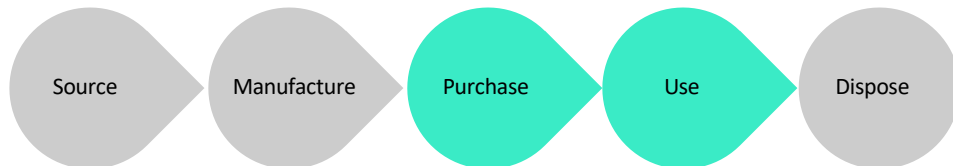
"We want to connect to the notion that marketers have this broader view of the world and can bridge art and science, creativity and innovation. So they are the ones who are creating the innovation in business models and business operating models for organisations."

Lex Bradshaw-Zanger, Chief Marketing and Digital Officer, L'Oréal, SAPMENA zone

Circular marketing & growth: shifting from a linear to a circular discipline.

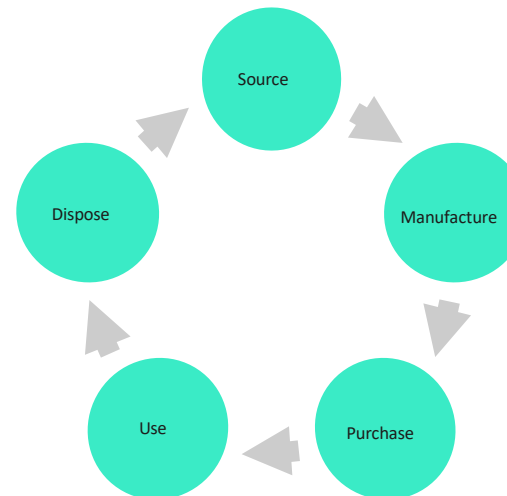
From.

Marketing's scope centred in purchase and use, within a linear value chain.



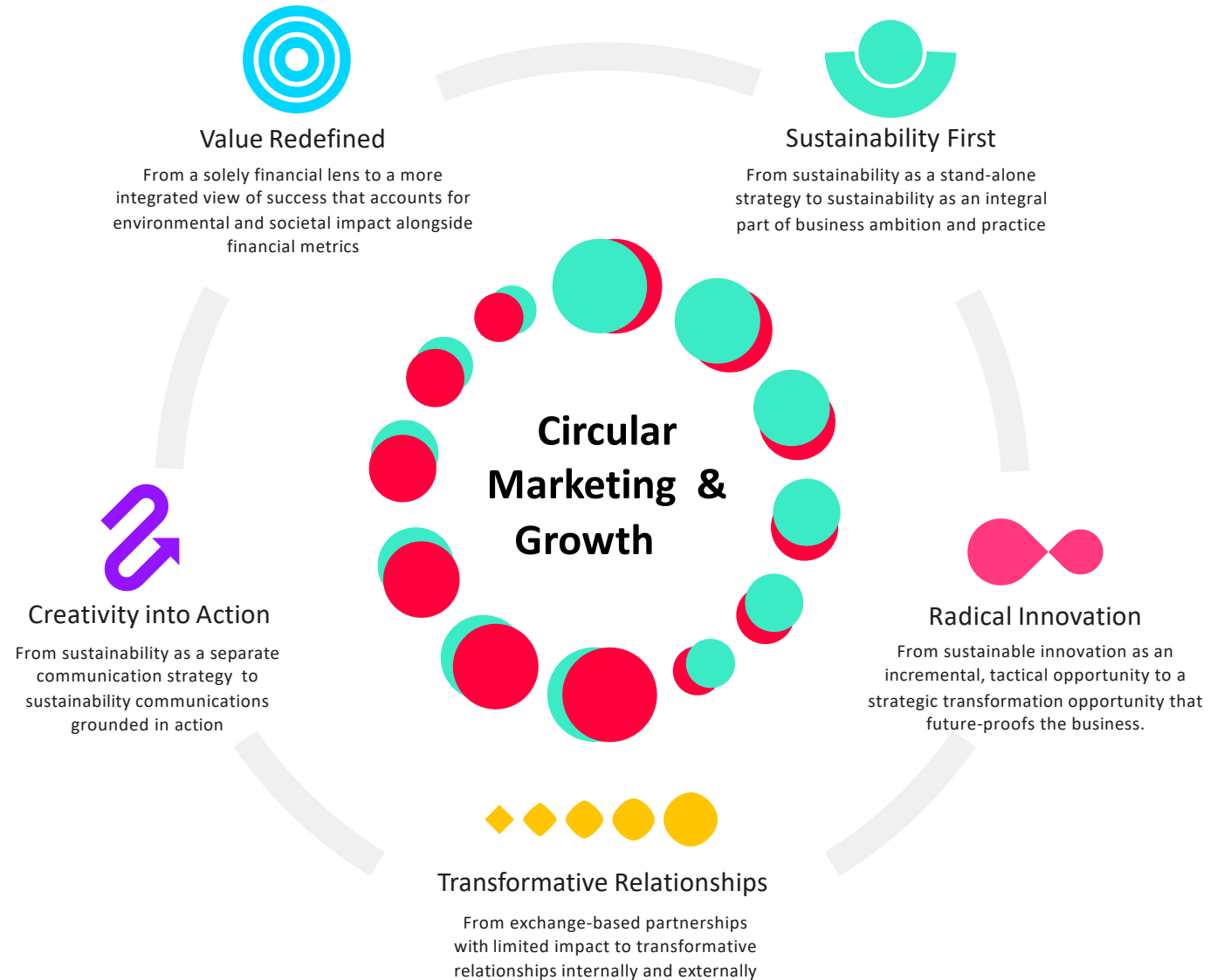
To.

Marketing's scope beyond purchase and use, in line with circular principles.



"As marketers, we need to understand the full value chain of our products and brands, not just the consumer benefit. I think that is a change in how we as an industry go about things. We have to understand our end-to-end value propositions, not only where we can bring value to the consumer, but where we bring value to all the other stakeholders in that value chain, from the farmer through to logistics and transport and how we maximise the value to our company, the planet and the people that we serve."

Jane Wakely, EVP, Chief Consumer and Marketing Officer and Chief Growth Officer, International Foods, PepsiCo



The background of the slide is a large, slightly faded image of the flag of the Benelux region. The flag consists of three horizontal stripes of red, white, and blue, with a central black square. Overlaid on this square is a golden lion rampant, which is the coat of arms of the Benelux countries. The lion is facing left, with its right paw raised and its tongue out. The flag is shown waving on a flagpole against a clear blue sky.

BENELUX regional deep-dive results

1. Setting the sustainability context

Full alignment on UN's Sustainability definition

Almost universal agreement with the 'sustainability' definition proposed by the United Nations, among marketers from Benelux, in line with their regional and global counterparts.

The following definition of 'sustainability', as defined by the United Nations, was proposed to all respondents:

Development that meets the needs of the present without compromising the ability of future generations to meet their own needs. This definition aspires to maintain economic progress while protecting the long-term well-being of the planet and people.

Agree with the definition



98%



97%



98%

*% Saying Yes

What would you add/ remove to this definition? (Open answers)

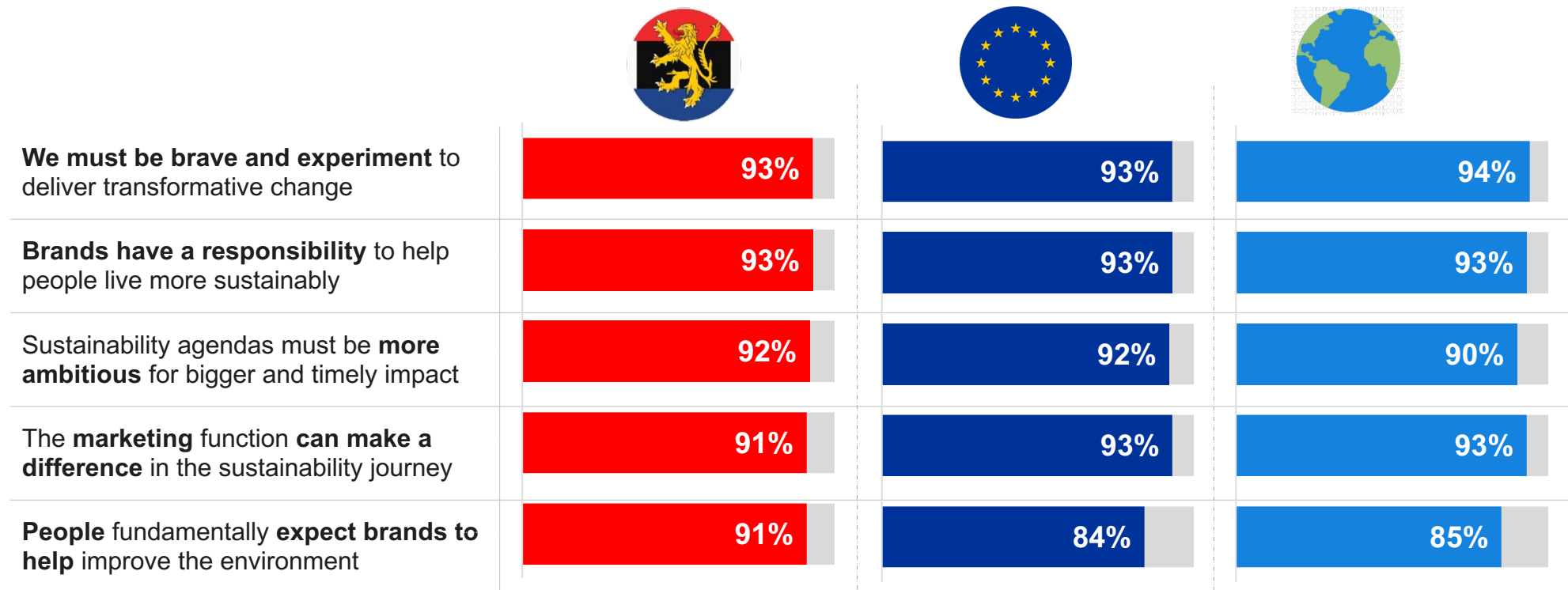
In Benelux marketers' words...

“Sustainability for me has the definition of reducing our harmful impact on the planet and the people on it at the forefront. It might mean that our definition of economic growth needs to change in order to achieve that. A select few have been growing at the cost of the planet and people, this needs to radically change. As part of sustainability initiatives, we'll need to redefine growth outside of GDP growth and continuous shareholder profit.”

(Media/Digital, Global role)

The role of marketing in the sustainability journey

Marketers in the Benelux region share the belief with their global peers that **brands should be responsible** to help people live more sustainably and that sustainability agendas must be **more ambitious** for bigger and timely impact. The strongest belief is that it is **imperative to be brave and experiment**, in order to deliver transformative change.

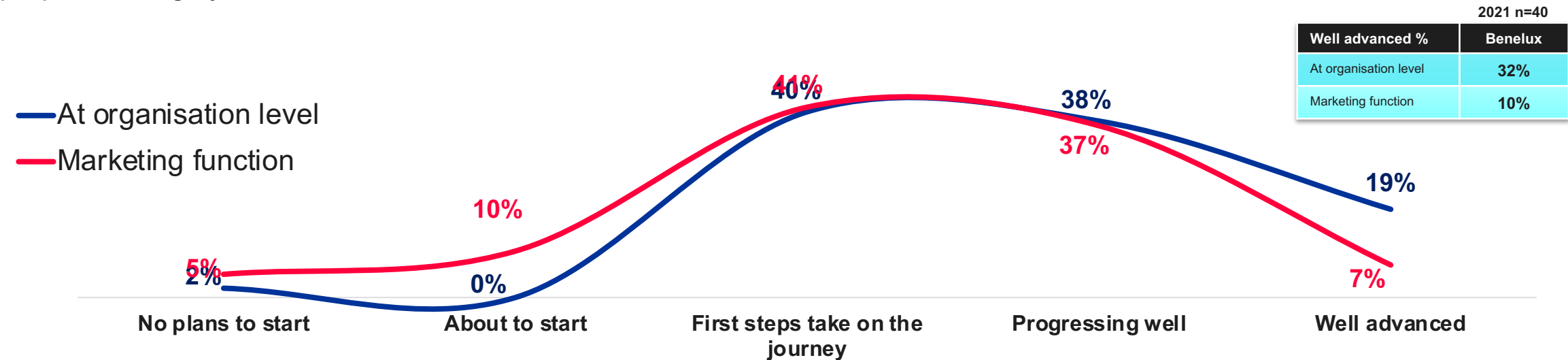


*The charts illustrate the sum of 'Strongly agree' and 'Somewhat agree' % from a 5-point scale

2. Progress on the sustainability journey

Closing the gap in the sustainability maturity journey

There is alignment between the organisation and the marketing function on the sustainability progress in Benelux countries. Around 1 in 10 feel that the marketing department in their organisation is well advanced on this front, proportion largely maintained since 2021.



Benchmarks 2023	No plans to start		About to start		First steps...		Progressing well		Well advanced	
	Global	Europe	Global	Europe	Global	Europe	Global	Europe	Global	Europe
At organisation level	4%	3%	4%	3%	31%	33%	44%	45%	15%	15%
Marketing function	2%	2%	10%	8%	39%	41%	36%	37%	10%	10%

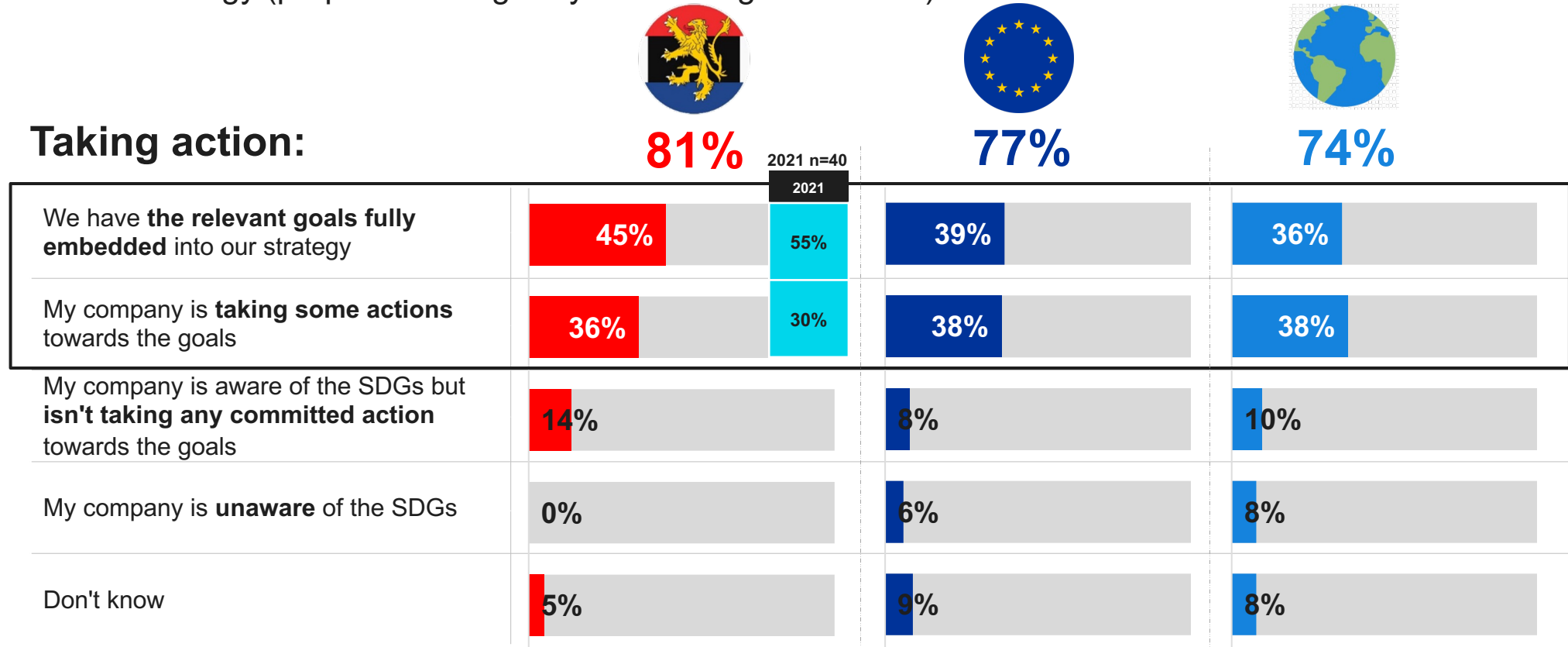


A1: As a company overall, how far along are you in the journey in terms of applying your company's sustainability agenda?
A2: And how far along is your marketing organisation in terms of translating your company's sustainability agenda specifically to your marketing function e.g., communicating about sustainability? (5 points scale, 1=No plans/ 5 =Well advanced)
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

81% taking action towards the UN's SDGs

4 out of 5 client-side marketers are taking actions related to the UN Sustainable Development Goals (SDGs), slightly higher than the global trend. Close to half claim they already have the **relevant goals fully embedded** into their organisation strategy (proportion marginally decreasing since 2021).



A3. The Sustainable Development Goals (SDGs) are a collection of 17 interlinked global goals designed to be a "blueprint to achieve a better and more sustainable future for all", set by the United Nations in 2015 and are intended to be achieved by 2030.

Is there an awareness of the SDGs within your company? *Single answer*

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

Gap analysis – How to read



*This analysis include the % sum of 4 + 5 on a 5 points scale



Marketing and Sustainability – Benelux focus

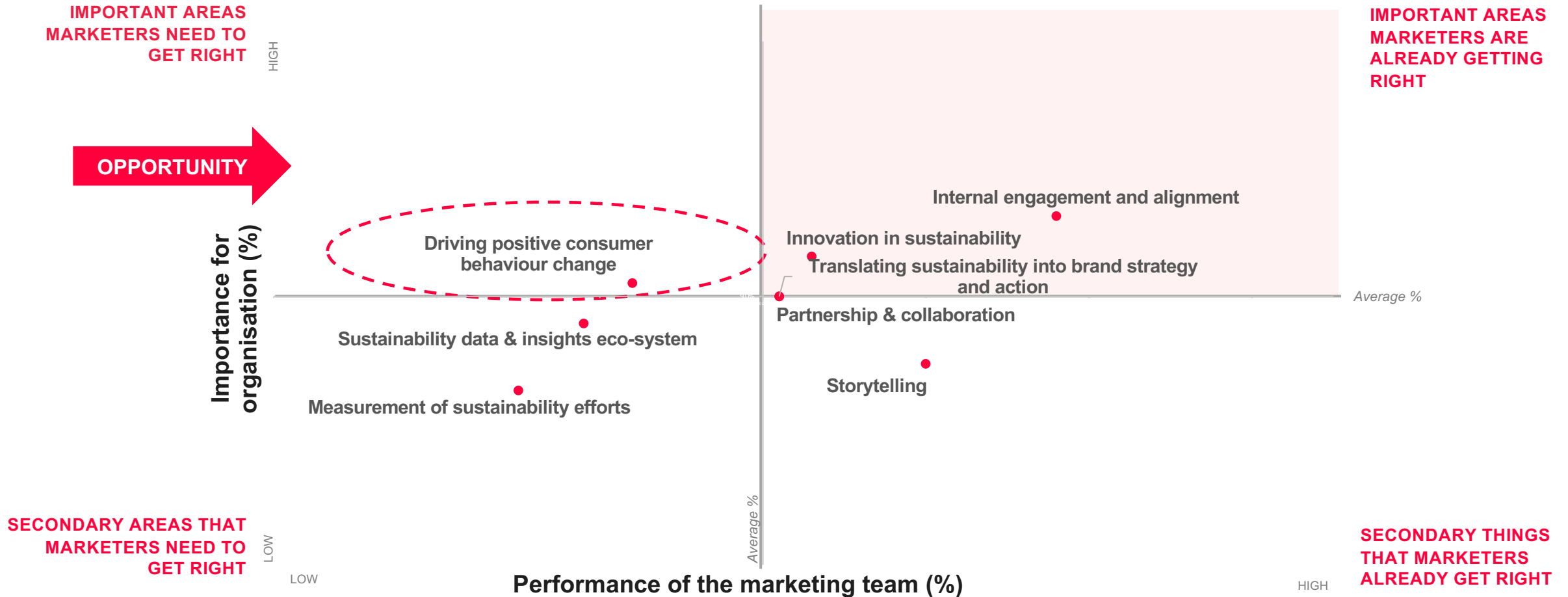


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)



Marketing and Sustainability – EUROPE

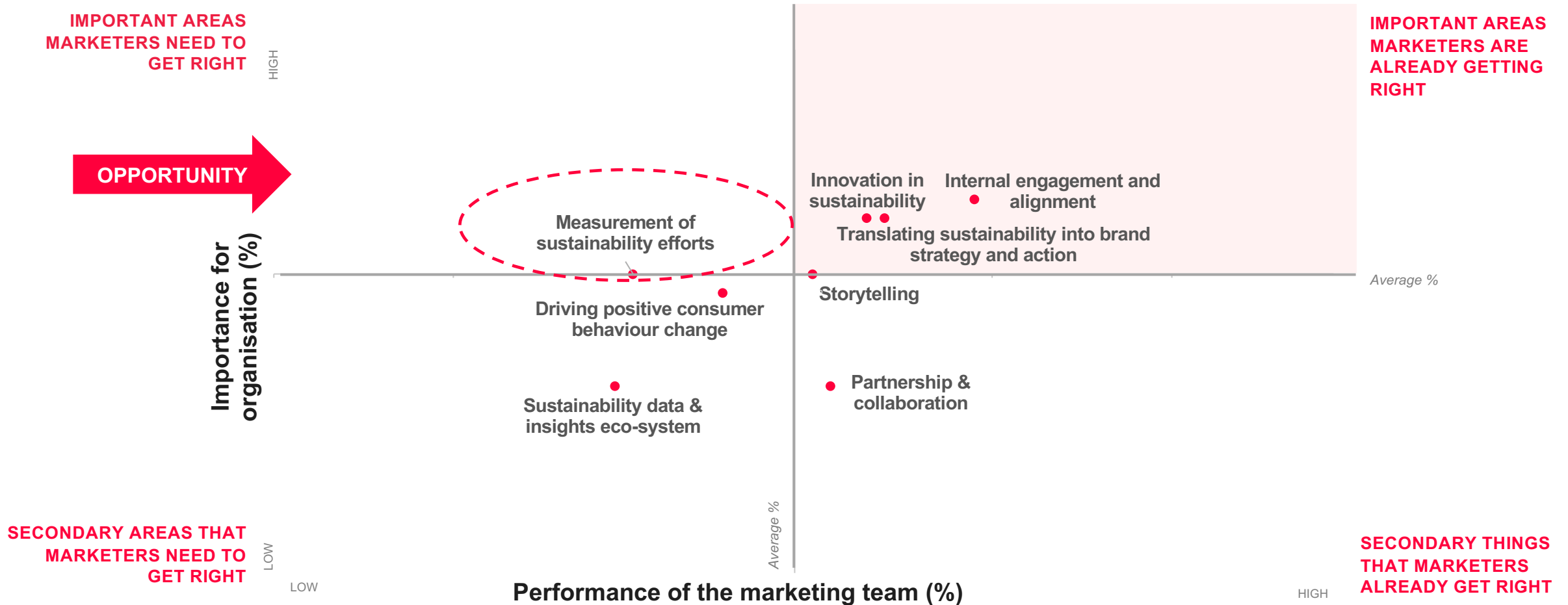


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

B3. Thinking about marketing and sustainability, how important are the following capabilities for your marketing organisation? (5 points scale, 1=Not important at all/ 5 =Very important)

B4. How does your marketing organisation perform against each of the following areas? (5 points scale, 1=Not important at all/ 5 =Very important)

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

Europe Base: 577 respondents



Marketing and Sustainability – GLOBAL

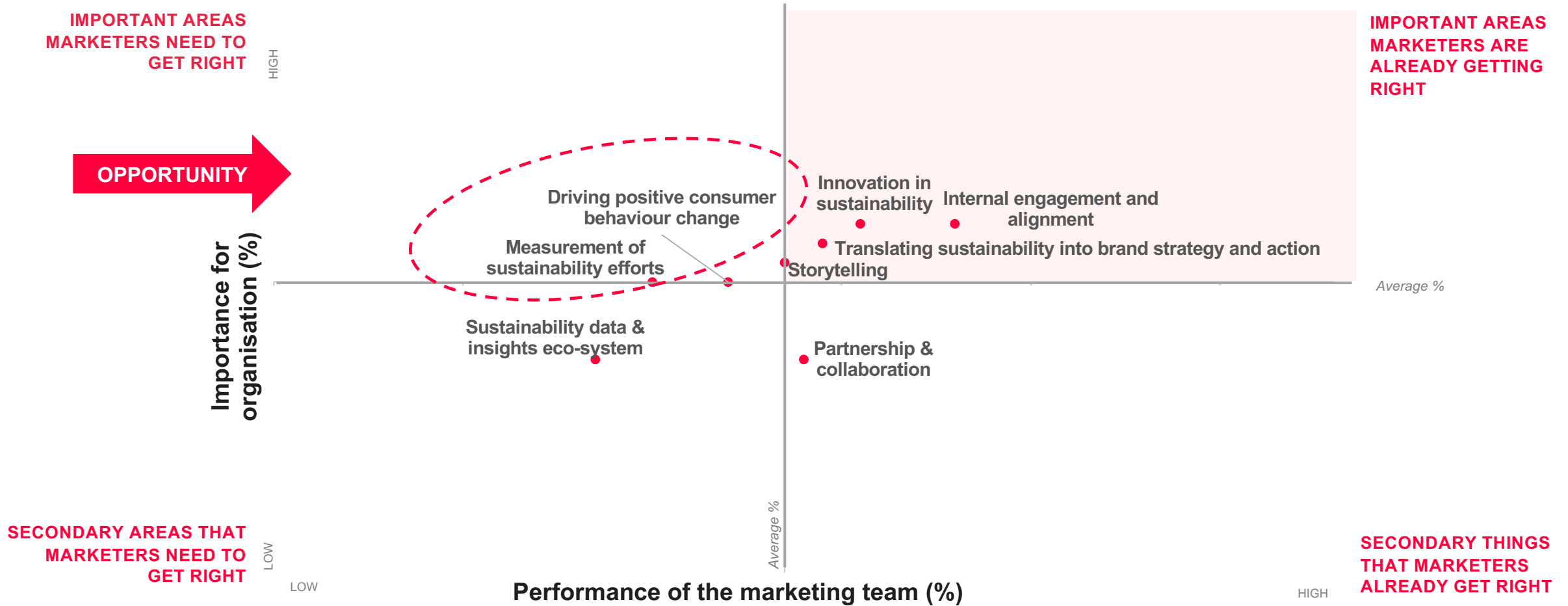


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

B3. Thinking about marketing and sustainability, how important are the following capabilities for your marketing organisation? (5 points scale, 1=Not important at all/ 5 =Very important)

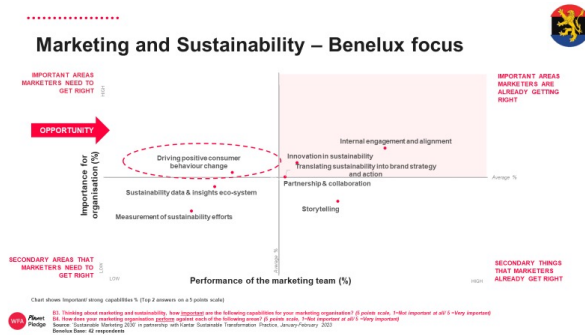
B4. How does your marketing organisation perform against each of the following areas? (5 points scale, 1=Not important at all/ 5 =Very important)

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

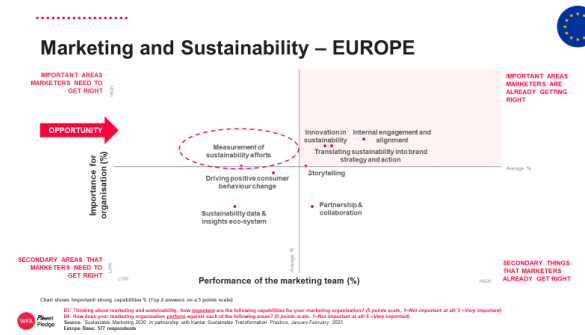
Global Base: 938 respondents

Gap analysis – Key learnings for Benelux

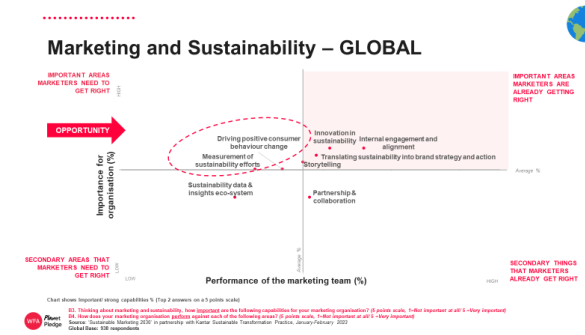
Market & Business initiatives – Benelux –



Market & Business initiatives – Europe benchmark –



Market & Business initiatives – Global benchmark –



Where does Benelux stand versus regional and global norms?

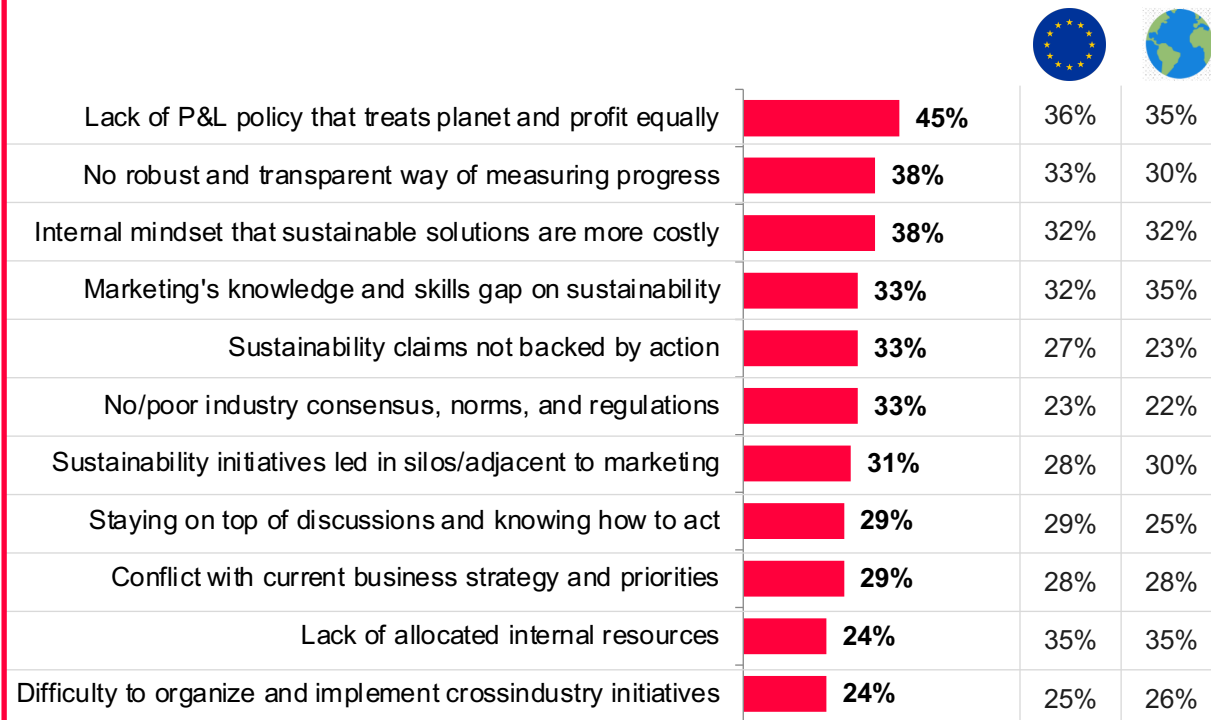
Senior marketers in Benelux are confident on the **internal engagement, innovation and translating sustainability into brand strategy and action** – three important aspects on which their organisations perform above average today, similarly to the regional and global trends.

On the other hand, **driving positive consumer behaviour change** represents an opportunity area for marketers in Benelux and worldwide.

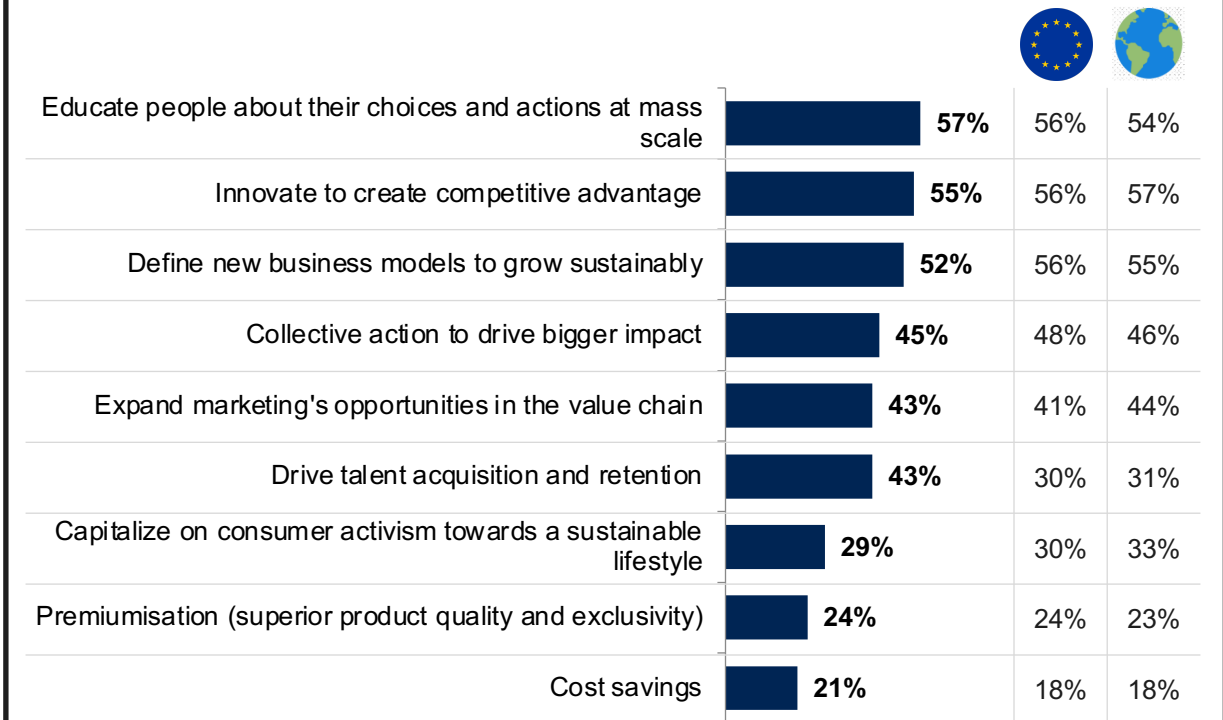
Challenges and Opportunities

Senior marketers indicate diverse challenges in the sustainability space, with **lack of P&L policy** that treats planet and profit equally being on top, a more prominent issue than globally. When it comes to opportunities, main focus should be on **educating consumers, innovation** and **defining new business models** – in Benelux and globally alike.

Main challenges in progressing sustainability ambitions



Main opportunities for marketing organisation



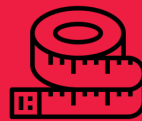
3. Sustainability performance across marketing levers



**Strategy &
Portfolio**



Innovation



Measurement



Communication

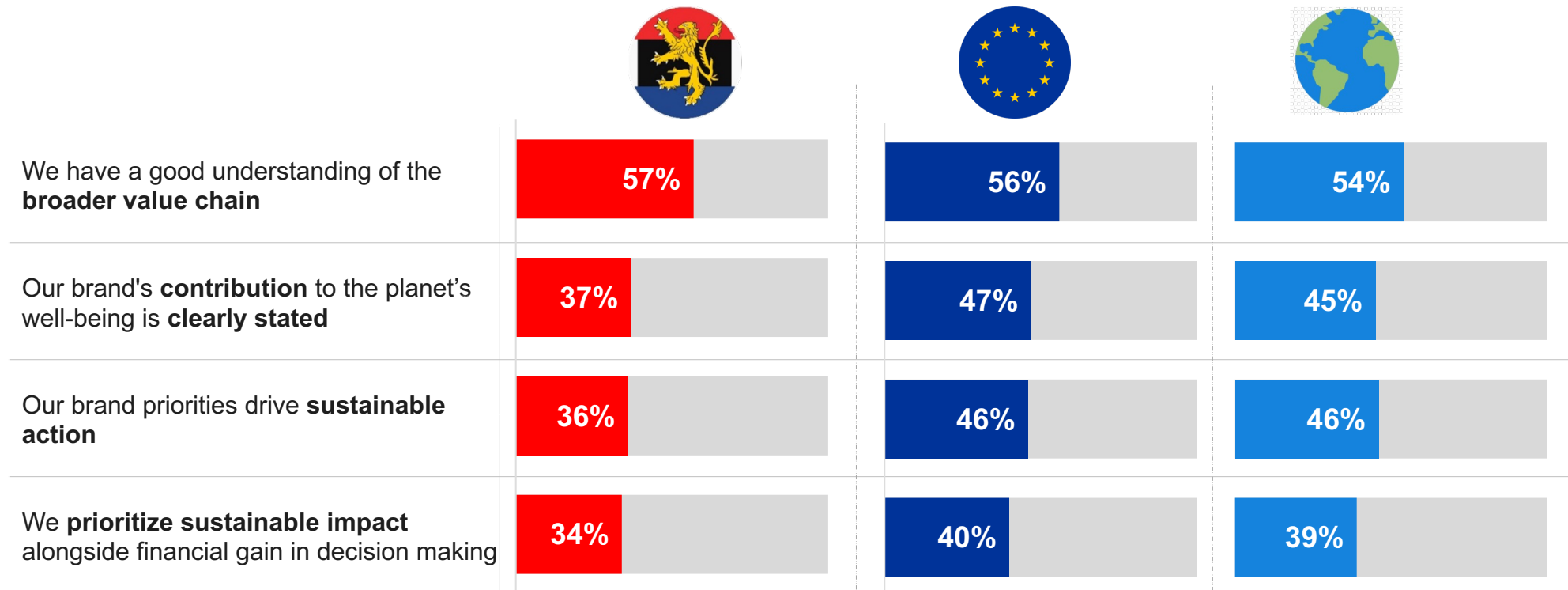


**Partnership &
Collaboration**

57% claim a good understanding of the broader value chain



More than half of the interviewed marketers claim they progressed well in owning a **good understanding** of the broader value chain, in line with the European and global benchmarks. Around one third are confident that their brand have a **clearly stated contribution** to the planet's well-being and **sustainable actions** are prioritised.



*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

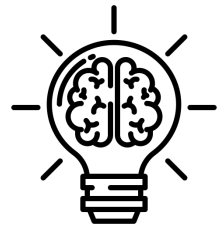
C1. How far along is your marketing organisation in the sustainability journey in terms of Strategy & Portfolio? (5 points scale, 1=No plans/ 5=Well advanced)

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

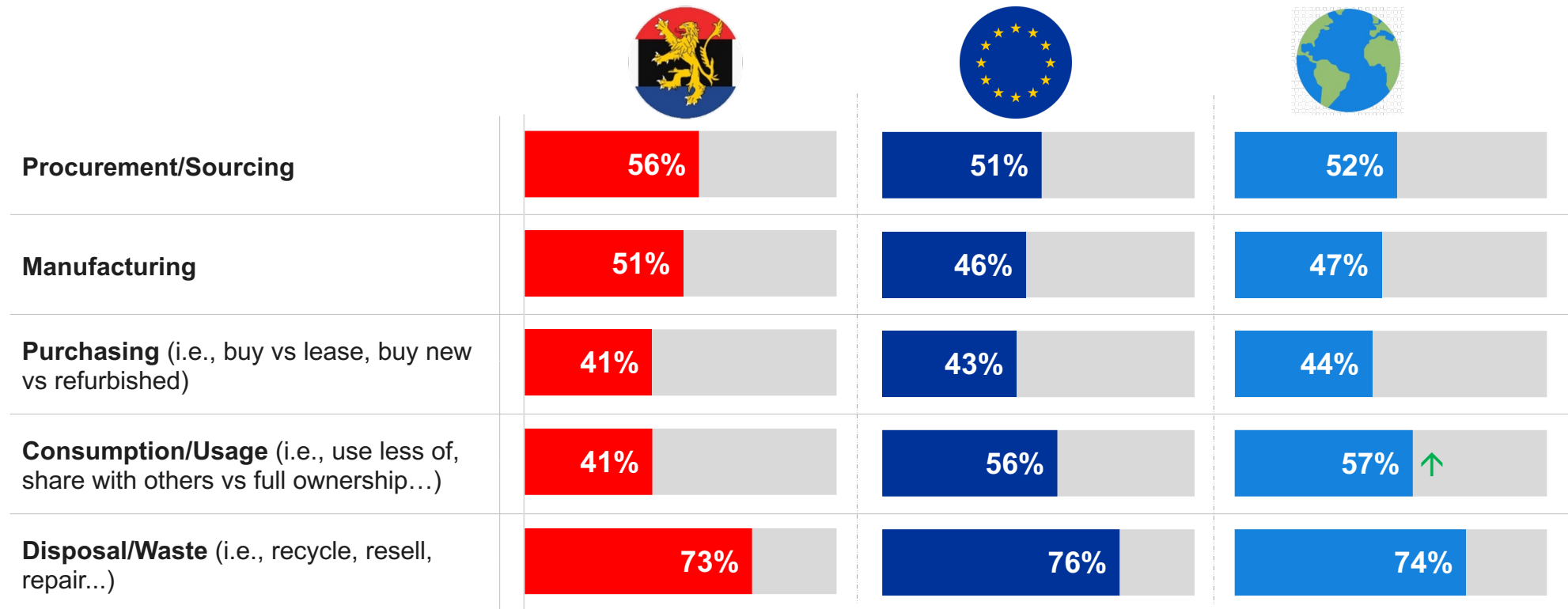
Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

73% focus their sustainable innovation efforts on recycling

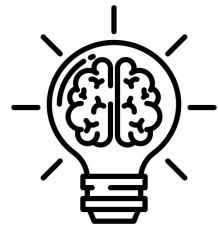


Most senior marketers stated that their organisation focuses their sustainable innovation efforts on **limiting their waste** through **recycling or repairing goods**. On the other hand, the extent of focusing on **consumption/usage** is significantly lower as compared with the worldwide benchmark.

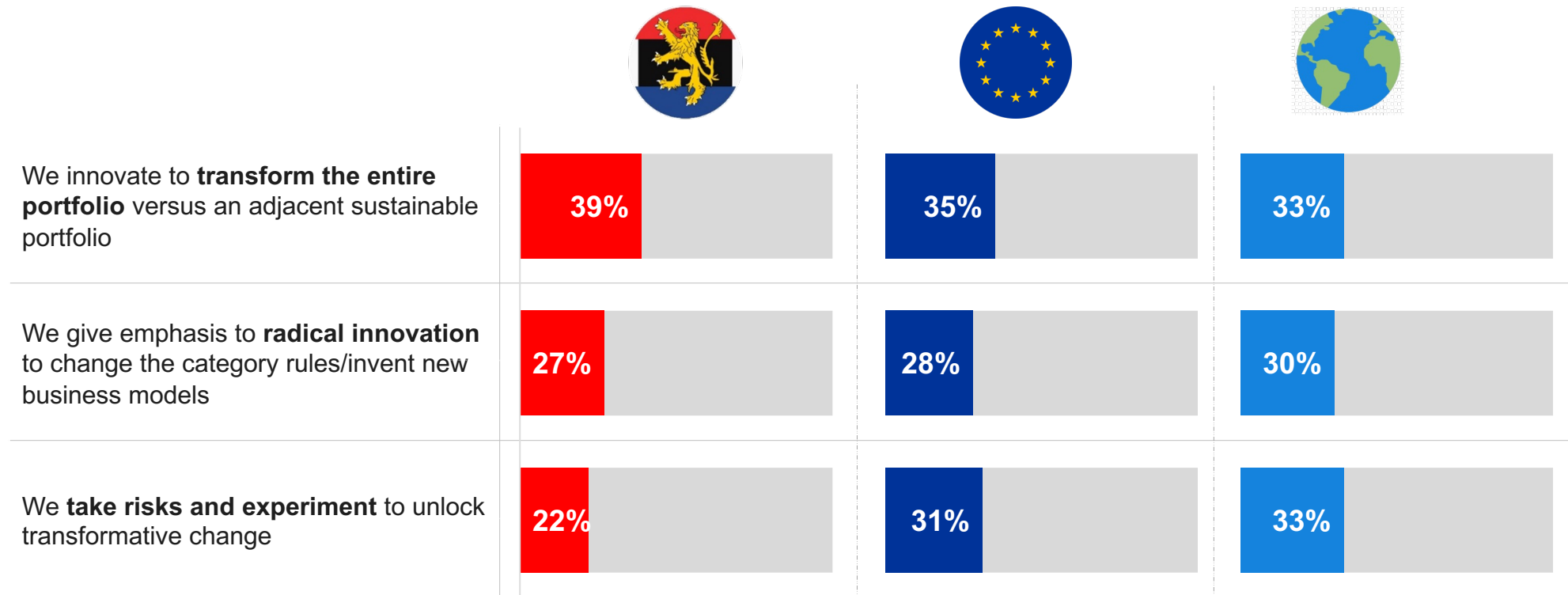


*% saying Yes

1 in 3 claim a good progress on sustainability innovation

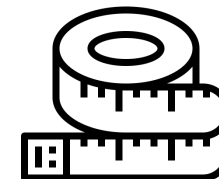


35% interviewed Benelux marketers are confident on their progress in **innovating to transform the entire portfolio** versus an adjacent sustainable portfolio – well aligned with the European and global trend.

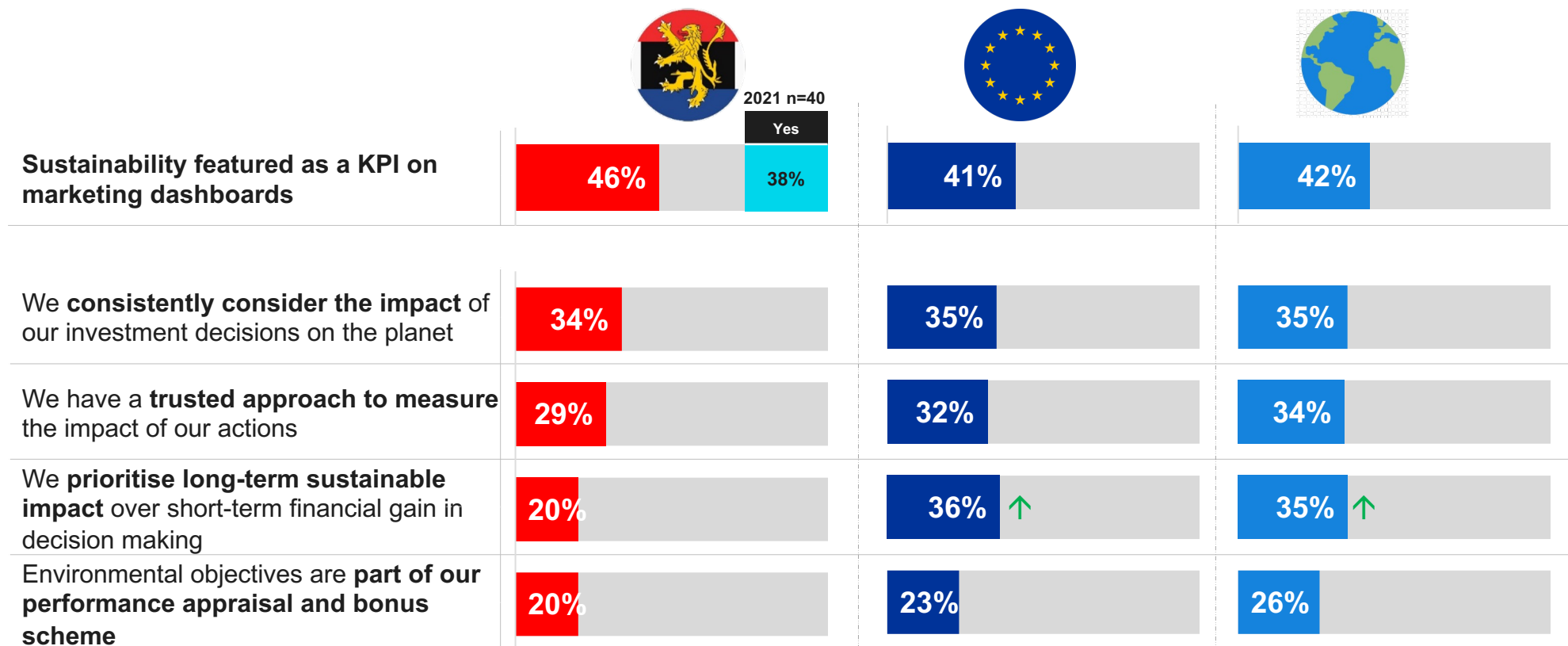


*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

46% stated that sustainability is set as a marketing KPI



Close to half of the marketers from Benelux have stated that **sustainability is set as a KPI on the marketing dashboard**, proportion slightly increasing since 2021. Yet, only 1 in 5 confirmed to have a good progress in **prioritising long-term sustainable impact** over short-term financial gain – significantly lower than the regional and global levels.



*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

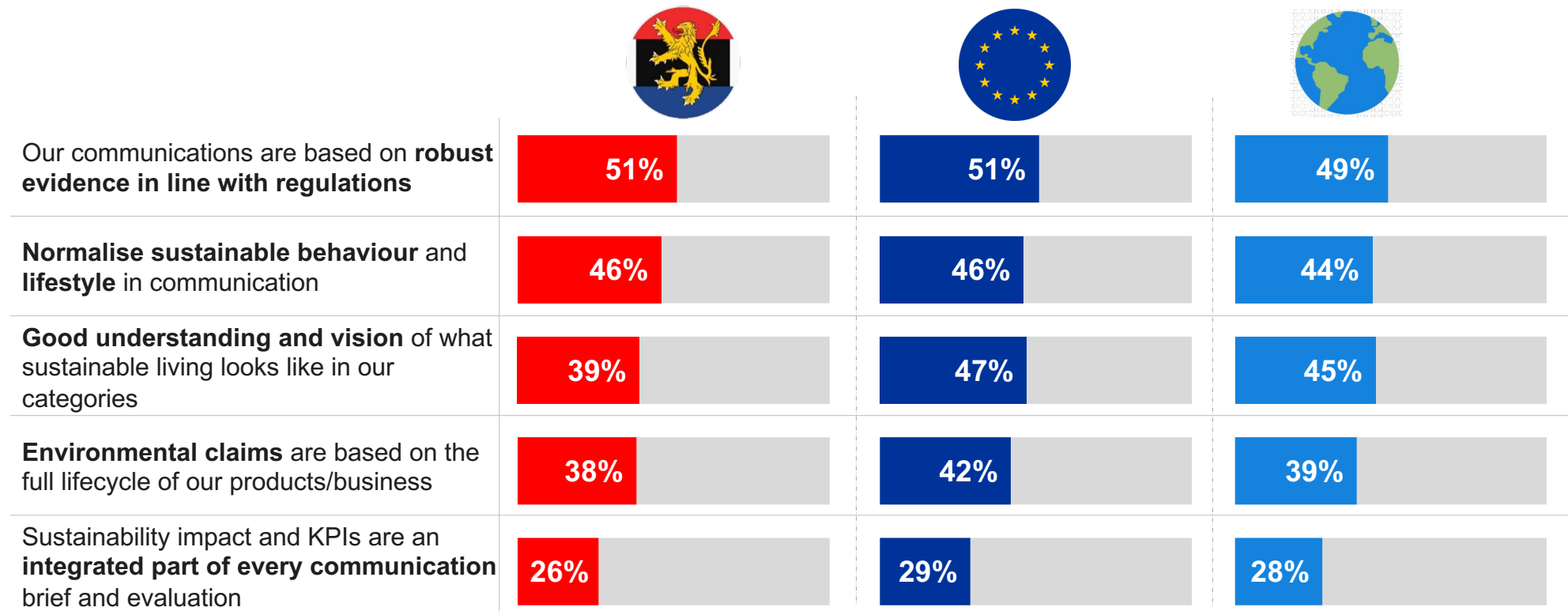
C6. Does sustainability feature as a KPI on your marketing dashboard? *Single answer* C7. How far along is your marketing organisation in the sustainability journey in terms of Measurement? (5 points scale, 1=No plans/ 5 =Well advanced)

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

Benelux reports similar Comms progress as the global trends



Half of the interviewed marketers in Benelux claim to be confident on their organisations progress in terms of comms, in line with Europe or worldwide, appreciating that their communications are based on **robust evidence in line with regulations** and that they have **normalised sustainable behaviour and lifestyle** in communication.



*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

C10. How far along is your marketing organisation in the sustainability journey in terms of Communication? (5 points scale, 1=No plans/ 5 =Well advanced)

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

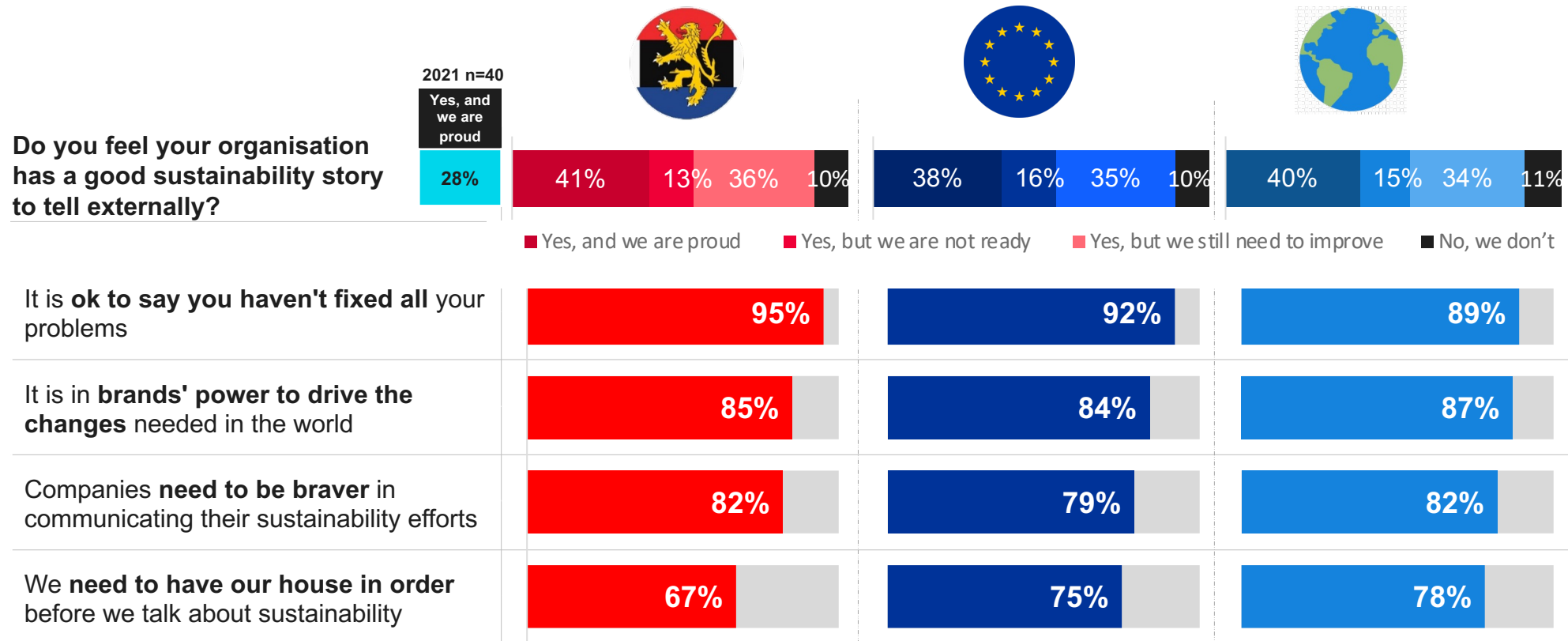
Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

Communication around sustainability



2 in 5 Benelux marketers are **proud to tell their sustainability story** today, similarly to their regional and global peers (showing notable increase since 2021). Most agree that it is **ok to say you haven't fixed all** your problems and that it is in **brands' power to drive the changes** needed in the world.



*The charts illustrate the sum of 'Strongly agree' and 'Somewhat agree' % from a 5-point scale

C8. Thinking generally about communicating around sustainability, to what extent do you agree with the following? (5 points scale, 1=Strongly disagree/ 5=Strongly agree)/ C9. Do you feel your organisation has a good sustainability story to tell externally? Single answer

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

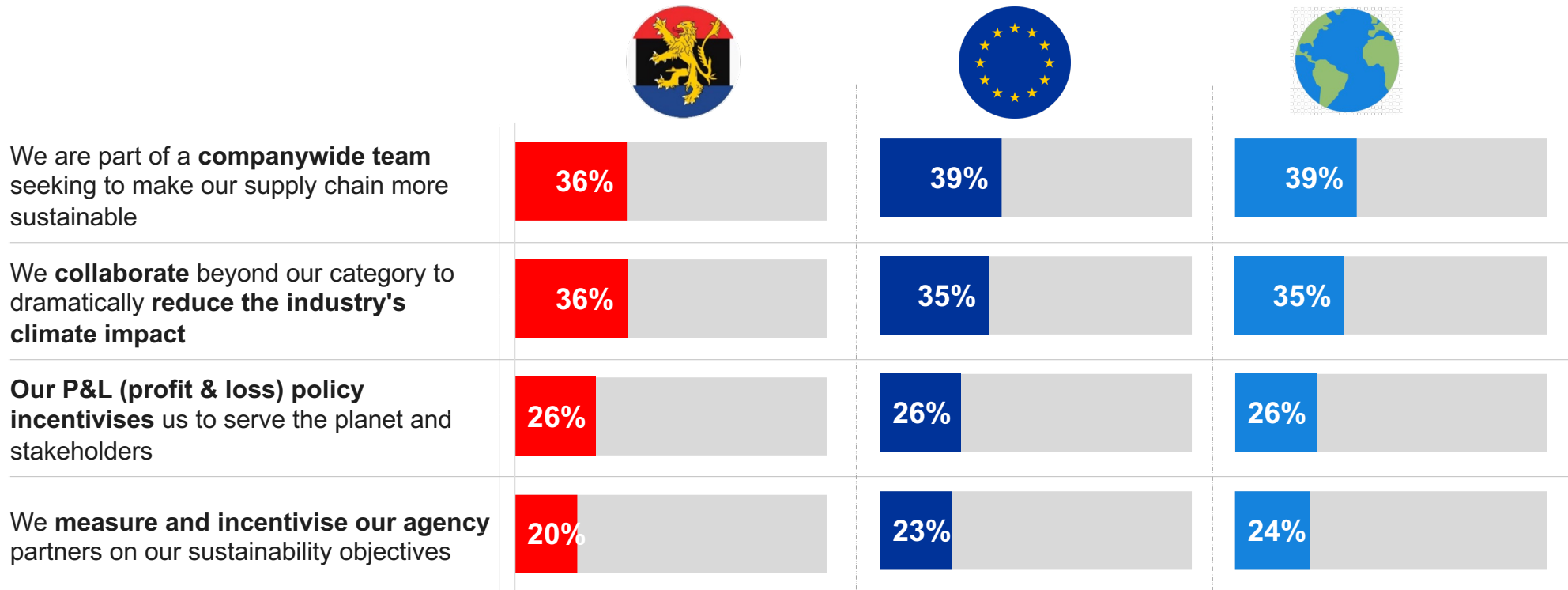
Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

36% collaborate to reduce the industry's climate impact



Around one third of Benelux marketers stated that they **collaborate** beyond their category to reduce the industry's climate impact, well aligned with the European and worldwide norms. And only 1 in 5 feels optimistic with their organisation's progress in **measuring and incentivising their agency partners** on sustainability objectives.



*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

C4. How far along is your marketing organisation in the sustainability journey in terms of Partnership & Collaboration? (5 points scale, 1=No plans/ 5 =Well advanced)

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

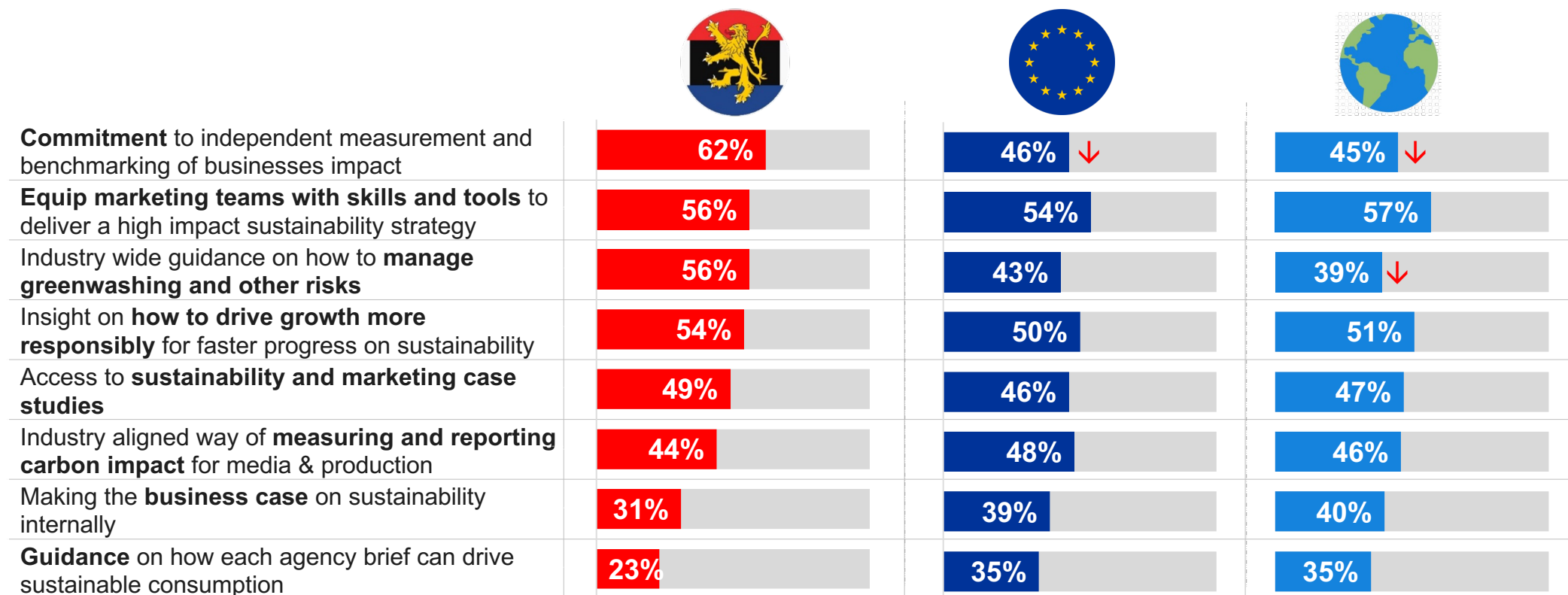
Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

What would help to achieve sustainability ambitions?



Commitment to independent measurement and benchmarking, training the marketing teams, equipping them with **skills and tools** and **guidance on how to manage greenwashing** are top elements believed to be of help in achieving sustainability ambitions in Benelux, with a stronger belief than in the other investigated markets.



Snapshot on Marketing levers



% Well advanced & Progressing well

Benelux marketers have **generally rated their organisations progressing similarly** to their European and global counterparts, in the sustainability journey, feeling most confident with the evolution on strategy and comms.

Measurement, collaboration and innovation aspects require more focus, being least advanced currently.

Cell colours highlight the **higher/lower** values

	Benelux	Europe	Global
Strategy & Portfolio			
We have a good understanding of the broader value chain	57%	56%	54%
Our brand's contribution to the planet's well-being is clearly stated	37%	47%	45%
Our brand priorities drive sustainable action	36%	46%	46%
We prioritize sustainable impact alongside financial gain in decision making	34%	40%	39%
Innovation			
We innovate to transform the entire portfolio versus an adjacent sustainable portfolio	39%	35%	33%
We give emphasis to radical innovation to change the category rules/invent new business models	27%	28%	30%
We take risks and experiment to unlock transformative change	22%	31%	33%
Measurement			
We consistently consider the impact of our investment decisions on the planet	34%	35%	35%
We have a trusted approach to measure the impact of our actions	29%	32%	34%
We prioritise longterm sustainable impact over shortterm financial gain in decision making	20%	36% ↑	35% ↑
Environmental objectives are part of our performance appraisal and bonus scheme	20%	23%	26%
Communication			
Our communications are based on robust evidence in line with regulations	51%	51%	49%
Normalise sustainable behaviour and lifestyle in communication	46%	46%	44%
Good understanding and vision of what sustainable living looks like in our categories	39%	47%	45%
Environmental claims are based on the full lifecycle of our products/business	38%	42%	39%
Sustainability impact and KPIs are an integrated part of every communication brief and evaluation	26%	29%	28%
Partnership & Collaboration			
We are part of a companywide team seeking to make our supply chain more sustainable	36%	39%	39%
We collaborate beyond our category to dramatically reduce the industry's climate impact	36%	35%	35%
Our P&L (profit & loss) policy incentivises us to serve the planet and stakeholders	26%	26%	26%
We measure and incentivise our agency partners on our sustainability objectives	20%	23%	24%



Arrows show significant higher/ lower difference at 95% confidence level



Planet
Pledge

C. How far along is your marketing organisation in the sustainability journey in terms of? (5 points scale, 1=No plans/ 5 =Well advanced)

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

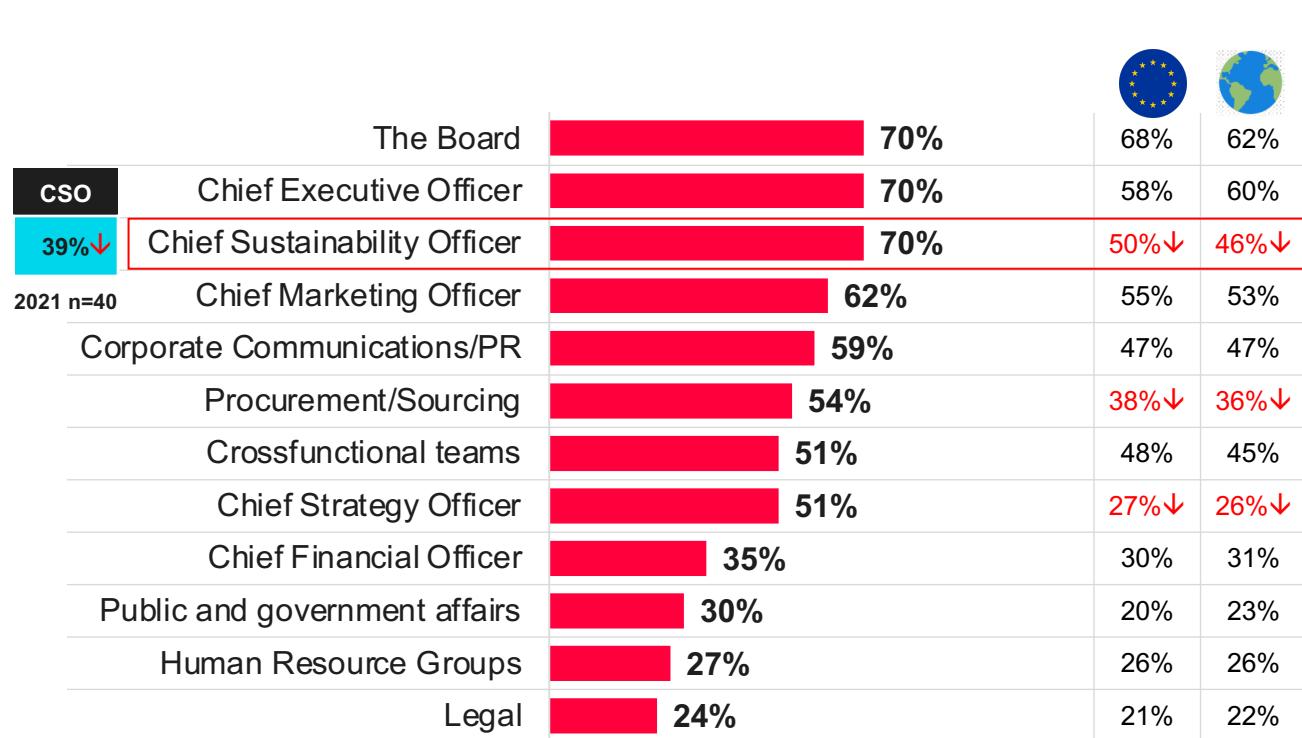
Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

4. Sustainability leadership

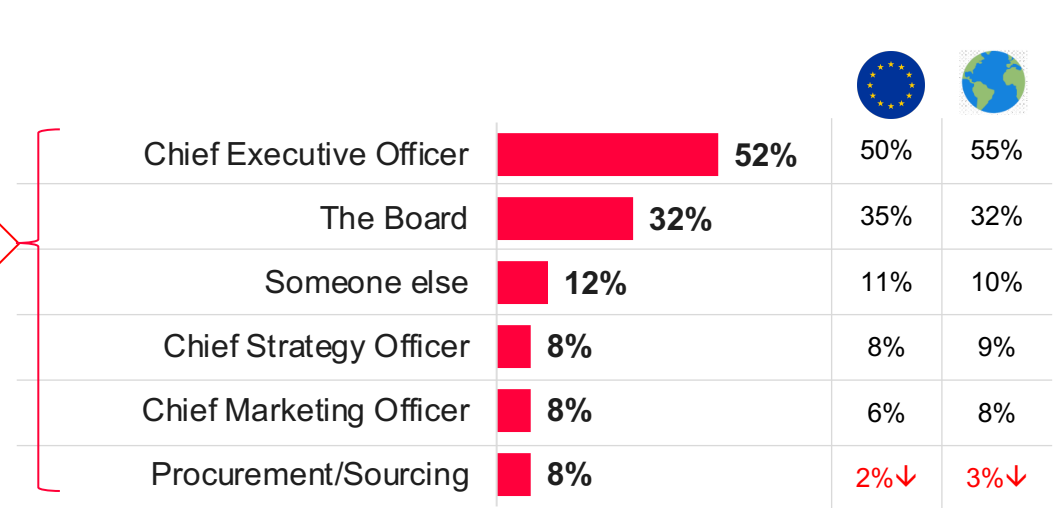
Defining the sustainability strategy

The main roles involved in designing and shaping the sustainability strategy in Benelux are the **Board**, the **CEO** and **CSO**. 70% indicated to have a Chief Sustainability Officer (proportion strongly increasing since 2021), mostly reporting directly to the CEO and the Board.

Who is involved in designing the sustainability strategy?



Who does the Chief Sustainability Officer report into*?



*Question addressed only to the respondents who indicated having a Chief Sustainable Officer

D1. Who is involved in designing and shaping the sustainability strategy? *Multiple answer*

D2. Who does the Chief Sustainability Officer report into?

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023

Global Base: 938 | Europe Base: 577 | Benelux Base: 42 respondents

Thoughts on improving the sustainability strategy

- 01 Create/ incorporate sustainability/ climate goals
- 02 Provide training/ education to consumers/ internally
- 03 Massive communication/ spread awareness
- 04 Focus on developing better technology/ innovation
- 05 Measure effect/ impact of climate

In Benelux marketers' words...

“Clear goals towards sustainability - focus on sustainability - good balance between costs & sustainability.” (Management, National role)

“Integrating the topic at the heart of their brand communications towards consumers, in order to contribute to the education.” (Marketing, Regional role)

“Ensure that there is mandatory sustainability training for all marketing team members and link sustainability to performance & goals.” (Sustainability/CSR, Global role)

“Reuse and repurpose Vs building something new all the time.” (Media/Digital, Global role)

“Create a culture of awareness in the total organisation, that in the total operations, innovations & partnerships we need to go for the extra mile together to answer the actual need for action to protect our environment.” (Marketing, Regional role)

“Clear norms and measurement tools across the industries.” (Insight/BI/Data, Global role)

“Be bolder in innovative solutions that can be driven outside the normal way of working and P&L. Really putting the action where our mouth is.” (Marketing, Regional role)

“Measure better what we are doing.” (Marketing, Regional role)

5. Key learnings

Executive Summary

1. Setting the sustainability context:

- ✓ Almost universal agreement with the definition of 'sustainability', among marketers from Benelux and worldwide.
- ✓ Senior marketers share the belief with their global peers that that **brands should be responsible** to help people live more sustainably and that sustainability agendas must be **more ambitious** for bigger and timely impact. Most feel that it is **imperative to be brave and experiment**, in order to deliver transformative change.

2. Progress on the sustainability journey:

- ✓ Sustainability in Benelux is progressing very well - **81% are taking actions** related to the UN's SDGs, fully aligned to the global norm. Close to half claim they already have the **relevant goals fully embedded** into their organisation strategy.
- ✓ Marketers in Benelux are confident on the **internal engagement, innovation** and **translating sustainability into brand strategy and action** – and need to **focus on driving positive consumer behaviour change**.
- ✓ Main challenge in the sustainability space refers to **lack of P&L policy** that treats planet and profit equally, a slightly more prominent issue than globally. When it comes to opportunities, **educating consumers, innovation** and **defining new business models** stand out.

3. Sustainability performance across marketing levers

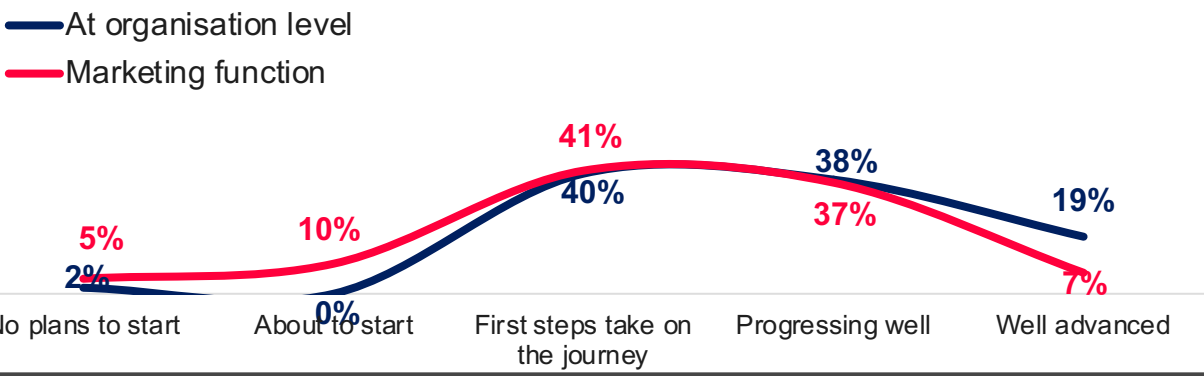
- ✓ Benelux marketers have **generally rated their organisations as progressing similarly** to their European and global counterparts, in the sustainability journey, feeling most confident with the evolution on strategy and comms.
- ✓ 36% claim that **sustainable actions are a priority** for the brand and majority **focus their sustainable innovation efforts on recycling**.
- ✓ **Commitment** to independent measurement and benchmarking, training the marketing teams, equipping them with **skills and tools** and **guidance on how to manage greenwashing** are top elements believed to be of help in achieving sustainability ambitions in Benelux, more so than in most other markets.

4. Sustainability leadership:

- ✓ The main roles involved in designing and shaping the sustainability strategy in Benelux are the Board, the CEO and CSO. 70% indicated to have a Chief Sustainability Officer (proportion strongly increasing since 2021), mostly reporting directly to the CEO and the Board.



Organisational and marketing sustainability journey maturity



Thoughts on improving the sustainability strategy

- | | |
|----|--|
| 01 | Create/ incorporate sustainability/ climate goals |
| 02 | Provide training/ education to consumers/ internally |
| 03 | Massive communication/ spread awareness |
| 04 | Focus on developing better technology/ innovation |
| 05 | Measure effect/ impact of climate |

Main responsible roles for shaping the sustainability strategy



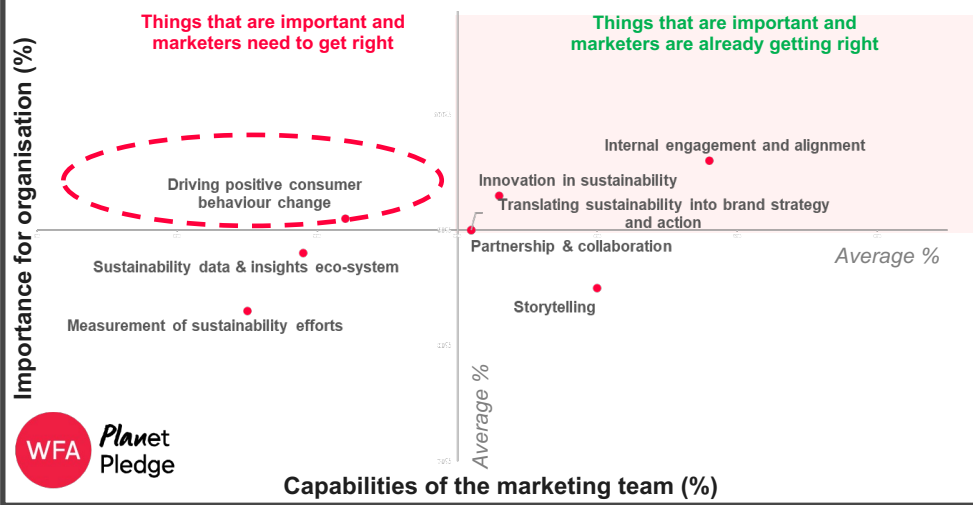
Main Opportunities

- Educate people about their choices and actions at mass scale
- Innovate to create competitive advantage
- Define new business models to grow sustainably

Main Challenges

- Lack of P&L policy that treats planet and profit equally
- No robust and transparent way of measuring progress
- Internal mindset that sustainable solutions are more costly

Marketing and Sustainability - Gap analysis



Progress on sustainability journey – Most advanced

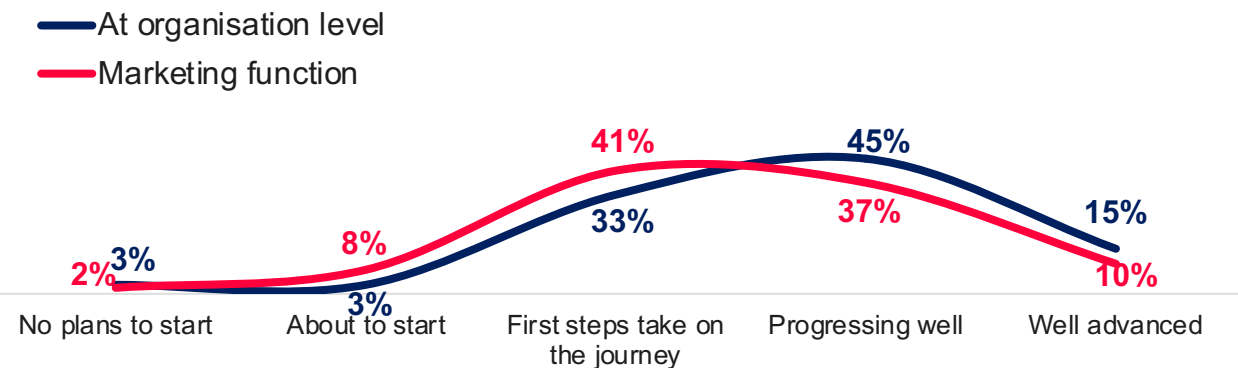
- | | |
|--|--|
| | ✓ We have a good understanding of the broader value chain (57%) |
| | ✓ We innovate to transform the entire portfolio versus an adjacent sustainable portfolio (39%) |
| | ✓ We consistently consider the impact of our investment decisions on the planet (34%) |
| | ✓ Our communications are based on robust evidence in line with regulations (51%) |
| | ✓ We are part of a companywide team seeking to make our supply chain more sustainable (36%) |

Progress on sustainability journey – Least advanced

- | | |
|--|---|
| | ➢ We prioritize sustainable impact alongside financial gain in decision making (34%) |
| | ➢ We take risks and experiment to unlock transformative change (22%) |
| | ➢ Environmental objectives are part of our performance appraisal and bonus scheme (20%) |
| | ➢ Sustainability impact and KPIs are an integrated part of every communication brief and evaluation (26%) |
| | ➢ We measure and incentivise our agency partners on our sustainability objectives (20%) |



Organisational and marketing sustainability journey maturity

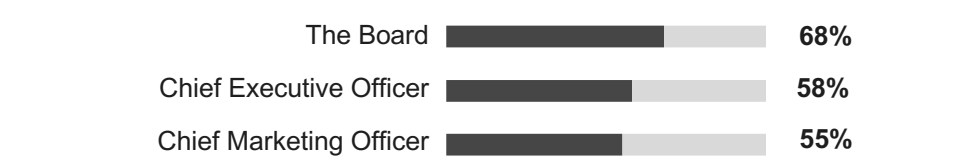


Thoughts on improving the sustainability strategy



01	Create/ incorporate sustainability/ climate goals
02	Provide training/ education to consumers/ internally
03	Communicate/ spread awareness
04	Measure effect /impact of climate
05	Embed sustainability as an KPI, besides sales and marketing goals

Main responsible roles for shaping the sustainability strategy



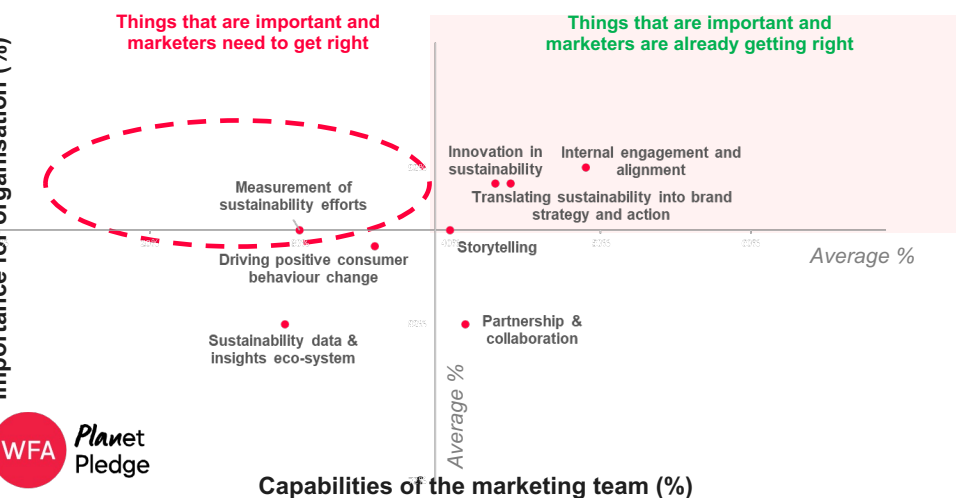
Main Opportunities

- Educate people about their choices and actions at mass scale
- Innovate to create competitive advantage
- Define new business models to grow sustainably

Main Challenges

- Lack of P&L policy that treats planet and profit equally
- Lack of allocated internal resources
- No robust and transparent way of measuring progress

Marketing and Sustainability - Gap analysis



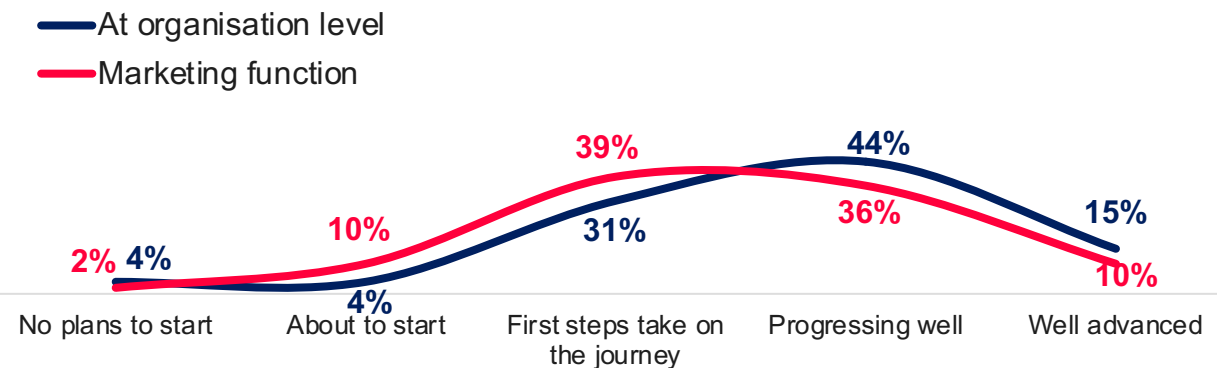
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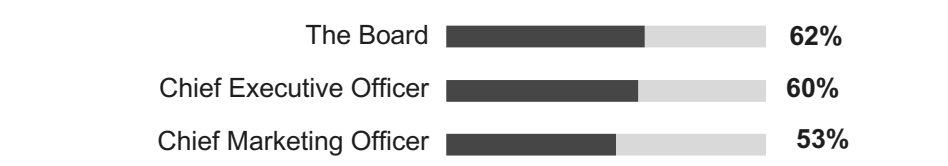
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Main responsible roles for shaping the sustainability strategy



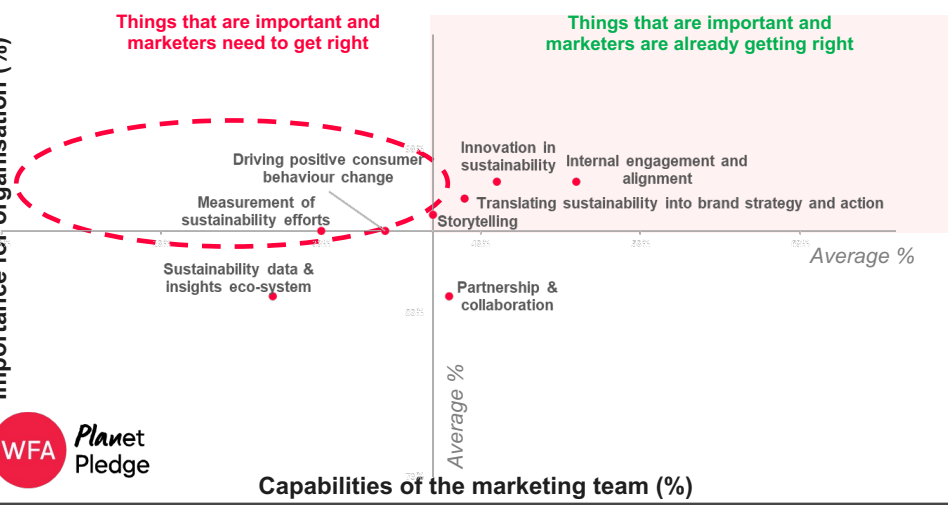
Main Opportunities

- Innovate to create competitive advantage
- Define new business models to grow sustainably
- Educate people about their choices and actions at mass scale

Main Challenges

- Lack of P&L policy that treats planet and profit equally
- Lack of allocated internal resources
- Marketing's knowledge and skills gap on sustainability

Marketing and Sustainability - Gap analysis

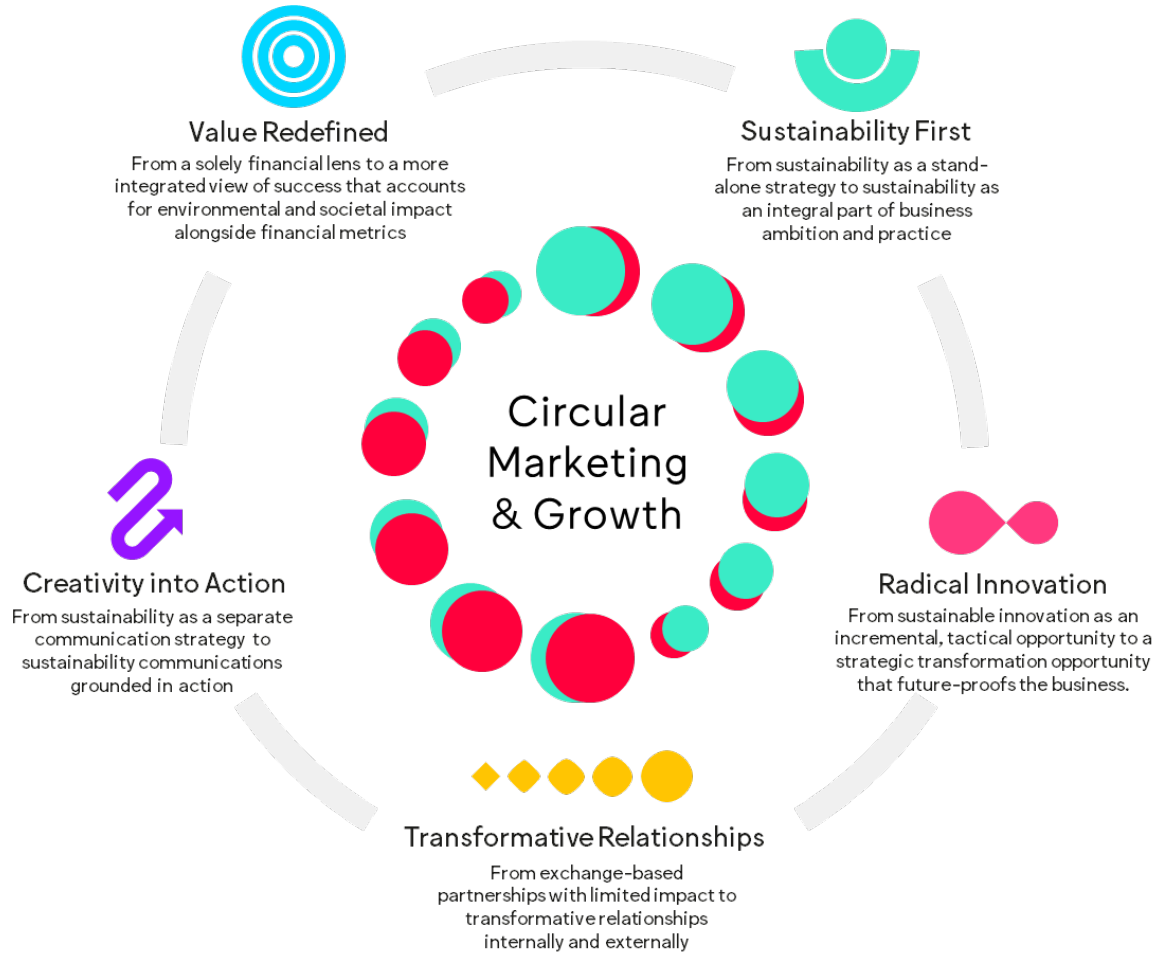


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THANK YOU!

Keen to learn more?
wfanet.org/planet-pledge



KANTAR