

The Sustainability Commitment

**Biggest Barriers for
Leading Brands**

Human Impact Tracker



e-book

What does sustainability mean to the consumer?

The humble plastic shopping bag was first patented in 1965 and quickly became a global phenomenon. As we all know though, this success was short-lived - as the devastating impact of single-use plastic soon came to light.



A plastic bag is used for an average of 12 minutes but has a life expectancy of 1,000 years

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A process of economic and social change in which natural resources, direction of investment, orientation of scientific and technological development, personal development and institutional change are consistent with each other and strengthen current and future capacities to meet human needs and aspirations.

Male, 41, Russia

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Living in a way that sustains our environment in a way that we can sustain human and animal life. Limiting plastic and single use items. Recycling everything where possible. Consciously consuming foods and only purchasing products I need.

Female, 26, UK

However, despite what the news might suggest, sustainability goes far beyond the issue of single-use plastic. Sustainability covers topics from food waste to carbon emissions to supply chains - and every market relates to a different aspect.

There's a lot of negative association with plastic and there are still thousands of petitions calling for Governments and brands to ban the use of single-use plastic in products and packaging. However, when asked - using open text - what comes to mind when thinking about sustainability, not a single country strongly connects it with plastic itself. In fact, only 3% of consumers worldwide automatically associate 'plastic free' with sustainability when responding in their own words.

Is a confusion over what 'sustainable' means blocking both consumers and brands from reducing their impact on the environment?

Sustainability is an incredibly diverse topic - some might even call it a buzzword - so Streetbees decided to look into how it translates into different meanings around the world.



Virginie Helias

**VP of Global Sustainability
Procter & Gamble**

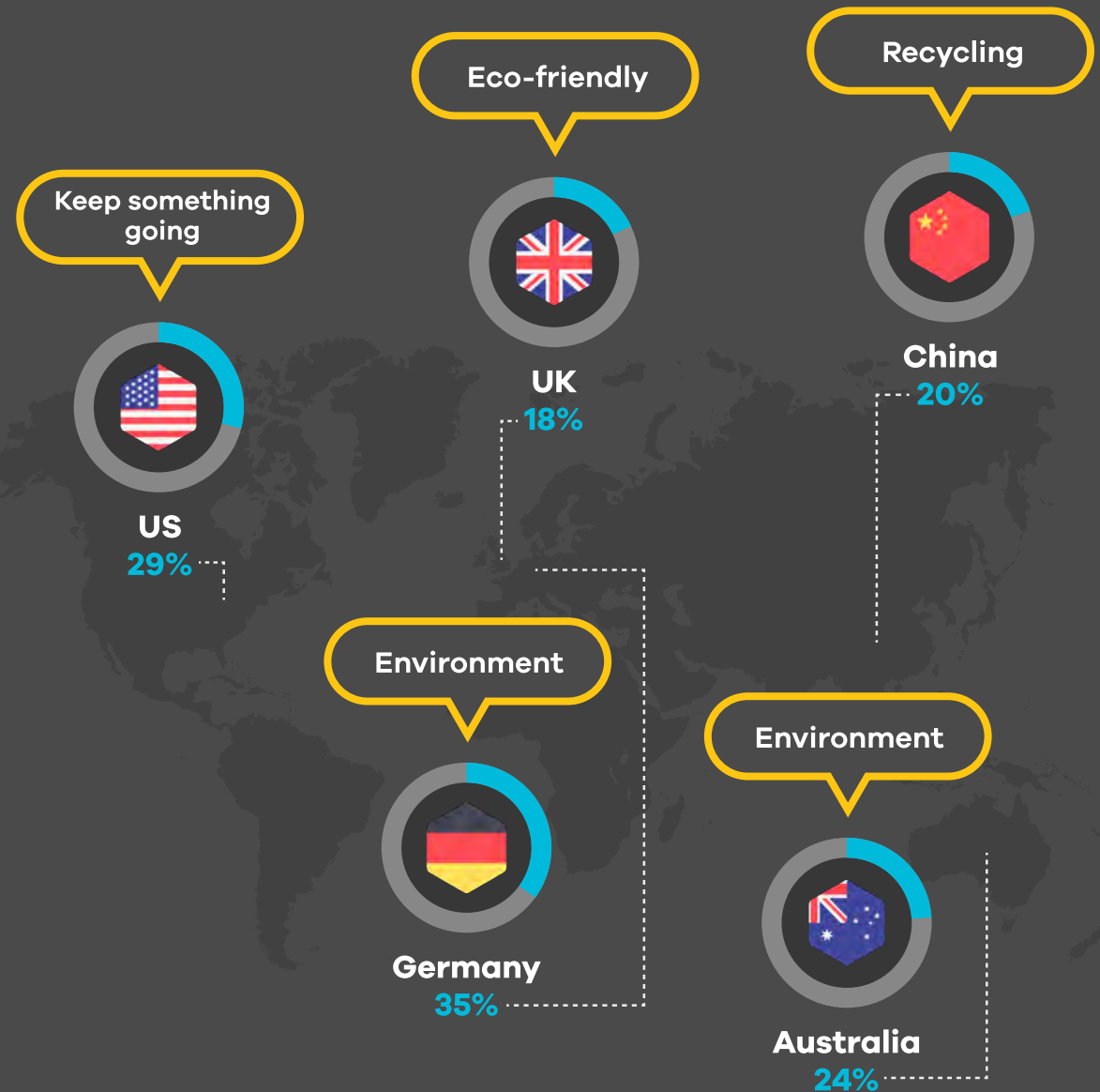
“Consumers expect the brands they trust to deliver superior performance and to also help solve some of the most complex challenges facing our world. [...] It will take partnerships and collaboration to make meaningful progress and our brands will develop innovations to take responsible consumption to the next level.”

Source: pg.com

By analysing open text conversations with our bees - or users - we found that US consumers associate 'sustainability' with making something last longer - therefore having a strong focus on reducing the need for single-use products as well as improving durability of materials, would resonate strongly with this audience. However, in China, the term is connected with recycling - this comes down to the manufacturing as well as communication around which materials are used.

But one finding rang true globally - consumers care about the environmental impact of their products, but they're not willing to change their behaviour... yet. Whether a product is or isn't seen as sustainable is rarely enough to influence their buying choices.

WHAT THE WORD 'SUSTAINABILITY' MEANS TO DIFFERENT CULTURES



Intention vs reality

While almost 8 in 10 consumers worldwide claim that sustainability is a priority when buying products, only 4% actually cited it when asked unprompted and in-the-moment of purchase.

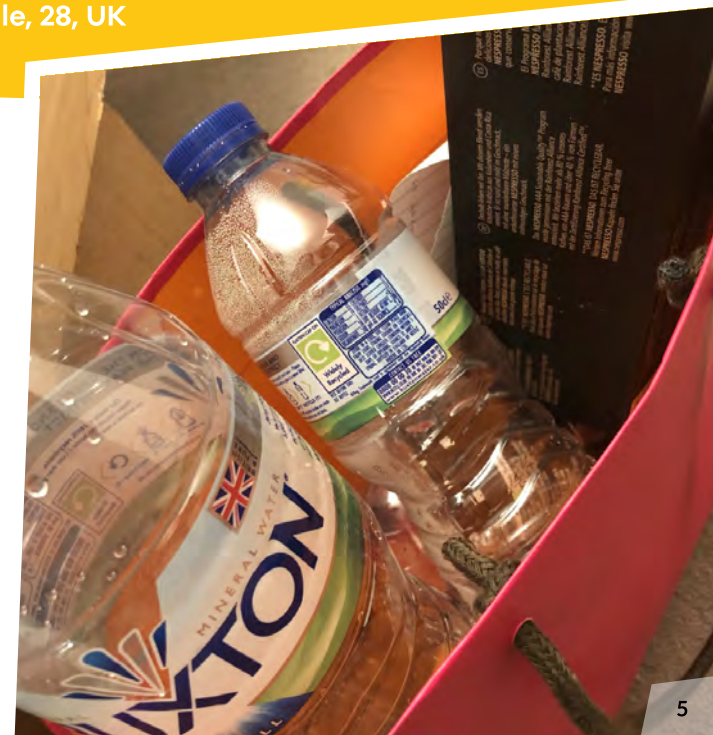
We see this time and time again - what people say they do and what they actually do are often very different. This isn't because they knowingly lie, it's because you can't know the true reasons behind your decisions unless you address it at the moment of choice.

Human behaviour is not rational - it's rarely what it seems. When asked in the moment of purchase, people's reasoning for why a product is sustainable or not lacks any kind of consistency. For products not seen as sustainable, 24% said it's because it contains plastic - however, for products that are sustainable, only 1% said it's because it doesn't contain plastic.

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I really think the onus is on the brand to make sure their products are easily recyclable. In order to recycle certain coffee capsules, you need to put them in a special bag and take them to a particular shop or CollectPlus location. They also offer a collection service but all these options mean keeping old coffee pods in the house and the whole process is more of a hassle than regular recycling. Sustainability is important to me and I'm very careful about recycling. But taking capsules to a particular location?? Sorry, that's just too much to ask!

Female, 28, UK



Here's the thing, you can be the most sustainable brand in the world, but if you're not able to communicate this in a way that resonates with the consumer, no one will know. Did you know that when asked unprompted what the brands they purchase from stand for, only 4% of consumers worldwide say sustainable/eco-friendly?

On top of this, 2 in 5 consumers don't actually know whether the product they're buying is sustainable or not. Are brands missing a valuable opportunity to communicate their efforts in this area? Would sustainability be a stronger driving factor if this was clearer?

Just because something gets strong media attention, doesn't mean it should become the sole focus. Brands need to know directly from consumers what matters to them, and in their own words. Building a strategy on what appears popular could not only result in a waste of money, but allow brands with a stronger customer connection to steal market share.

Knowing how different markets define different product features allows brands to tailor their messaging throughout their product lines.

2 in 5

consumers don't know whether the product they are buying is sustainable



Time for some trash talk

It's not just the beginning of the product that matters - i.e. manufacturing, packaging - it's the entire life cycle that brands are having to plan for. In 2018, England alone produced 22m tonnes of waste - with the amount recycled down 300,000 tonnes compared to the previous year. Not only are people not recycling - we're doing it less and less.

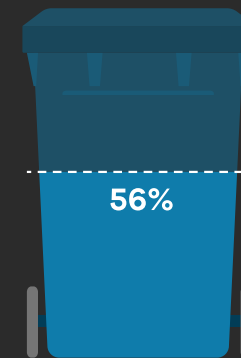
Unsurprisingly, the majority of waste that consumers produce is from food and drinks packaging - from boxes to bottles to wrapping, mostly made from plastic, cardboard or paper. Yet, looking at real consumer behaviour, only 56% of waste is actually recycled.

Is it apathy that's stopping consumers from being more environmentally friendly?

Less than 1 in 10 non-recyclers just don't care - but we already know that caring isn't enough.



22 million
tonnes of waste were
produced in England (2018)



Only
56%
of waste is
recycled

1 in 10

non-recyclers just don't care



One of the leading reasons that people don't recycle is actually because they don't have the facilities to do so - or at least they're not aware of them. Over a third (34%) of our bees in the US and UK say they don't have recycling available at their home or work. Do workplaces need to do a better job at signposting this service?

One clear strategy to help tackle this gap in information is through stronger communication - from everyone. And yes, there is a place for brands to do their part here - here's an example:

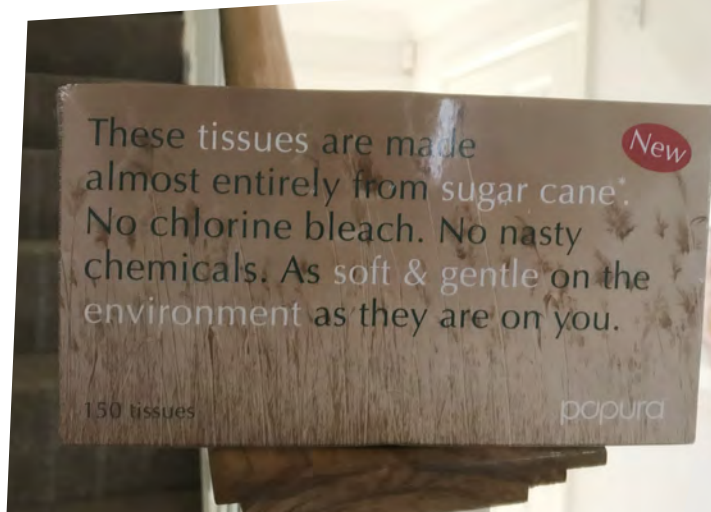
Coca Cola launched a campaign across Europe that saw the company provide recycling facilities to public areas - such as at festivals, along with billboards directing people to the nearest bins. This works perfectly to improve brand sentiment and makes it very easy for consumers to recycle their cans and bottles.

Communication goes beyond having a recyclable logo on the back of packaging - it's thinking of new ways to use your brand's existing strength to encourage change amongst consumers.

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I like diet coke and Pepsi Max. There was no Pepsi Max in the shop, so Diet Coke it was. I also always look for cans rather than plastic bottles and that's what was in the can section.

Female, 29, UK



Finding new ways of working

Another route to explore is finding ways to make non-recyclable materials recyclable - eliminating the question mark over what to put in the waste bin. One example of this is black plastic bottles used in personal care; up until last year this packaging could not be detected or sorted mechanically due to the pigment. Faced with this, Unilever created a new detectable pigment that could save 2,500 tonnes of plastic bottles from going to landfill.

Another example is how Jean makers Levi Strauss & Co. launched its Levi's Water<Less™ fabrics that led to up to 65% reduction in water usage compared to traditional indigo rope dyeing - that's 6 litres saved per garment.

Both of these strategies prove that becoming a more sustainable business requires creativity and commitment - something that not all brands can realistically afford to give. However, when the world's leading companies prove the worth of investing in such initiatives, it paves the way for the rest of them.



A new detectable pigment, created by Unilever, has the potential to save **2,500 tonnes** of plastic



Alan Jope

CEO
Unilever

"We can only eliminate plastic waste by acting fast and taking radical action at all points in the plastic cycle. [...] This demands a fundamental rethink in our approach to our packaging and products. It requires us to introduce new and innovative packaging materials and scale up new business models, like re-use and re-fill formats, at an unprecedented speed and intensity."

Source: [unilever.com](https://www.unilever.com)

Fancy a takeaway?

As we've seen, it's not enough to make something recyclable to get consumers to change their buying or usage behaviour - and adding a premium price simply adds insult to injury when products are expected to be more environmentally friendly as a given. So what have we learnt?

Understanding cultural nuances

How can you expect to connect with your customers if you don't know what really matters to them? Sustainability is a global concept - but that doesn't automatically incite consistency. We've seen how different countries associate varying definitions and behaviours with the term demonstrating how naive it is to assume one communication strategy will work for all.

This is exactly how challenger brands establish such a cult following; they start off with an intimate knowledge of one market and know exactly what will resonate with them. This is harder for incumbents of course as they aren't blessed with a clean slate - however, they already have an established global presence.

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I try to use reusable products instead of disposable ones and buy products that are not packaged in plastic. I avoid buying from high street fashion outlets who I know are unethical and choose to buy from ethical fashion retailers or second hand.

Female, 36, UK

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Products that consider more than features and pricing. Sustainability takes into account the triple bottom line, ie. the people and natural resources that go into production as well as the overall impact of the product.

Male, 27, Germany

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These shoes are 5 years old, have been worn almost every day - just had them repaired and refreshed and they are essentially as good as new. I expect them to last indefinitely, reducing my need to buy shoes again anytime soon.

Male, 38, France

Creating a sustainability strategy will require iterations of your message; which countries value durability compared to those that prioritise a reduction of single-use items? Take for example a titanium water bottle - you could pitch it as a way to cut down on single-use plastic, as a product that lasts a long time and doesn't require replacing, or simply as a way to reduce our environmental impact through the choice of material. All three messages are accurate but each one will connect with different markets.

Consider the whole life cycle

From manufacturing to disposal, the different phases of a product's life means different things for sustainability. However, it's not always possible to completely overhaul the entire production process in order to make every element more environmentally friendly. So how can brands tackle this issue?

The type of product is crucial in understanding this; for example consumers will care more about the manufacturing process of clothes, whereas for plastic packaging, it is about whether it's recyclable.

Streetbees' Always ON platform
2.5bn data point, 3.5m bees, 190 countries

LEARN MORE



WHY DID YOU BUY THIS SPECIFIC PRODUCT?

(Those who say sustainability reasons unprompted)



Homecare

9%



Personal Care

7%



Food & Beverages

2%



Clothing/Apparel

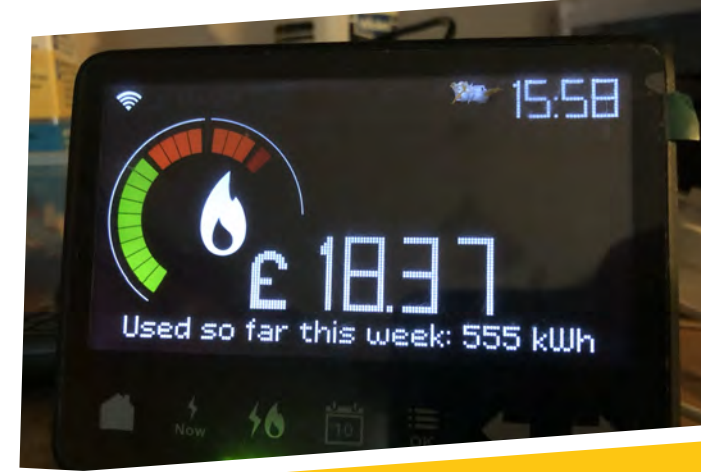
2%

Investment comes in many forms

We are all agreed that action needs to be taken to protect the planet - unfortunately, you can have all the good intentions in the world, but if you can't prove ROI or financial viability, it can be a struggle to move forward.

Not every company can funnel money into new initiatives but adaptation and growth requires some form of investment - whether that's through research, updating infrastructure or simply collaborating with others. Lots of brands offset the money invested by attached premium prices to their products - but if sustainability isn't a main driver for consumer purchases, raising the price will simply alienate them further.

So what can you do? When budgets are tight, knowing what to prioritise is essential and this can only be achieved one way - creating a strategy focused around the consumer.



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I am not in any financial situation for sustainability to even be a passing thought. Plus I do not believe for one second that consumer changes can make a difference if manufacturers are still allowed to carry on as they are.

Female, 31, UK

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I notice I am throwing out a lot of soft plastics from the packaging of my personal care and clothing purchases. I'm super aware that it's bad for the environment and I want to stop but it seems everything comes packaged like this!!

Female, 21, Australia

A clear vision

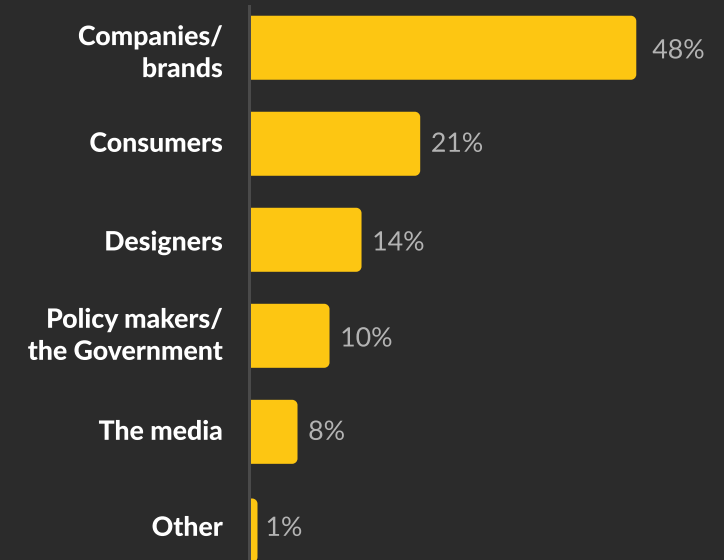
The years ahead will no doubt bring its own wave of challenges but one thing is clear - sustainability will remain a high priority across all industries.

The Fashion industry

In 2019, we saw a number of fashion retailers join the \$1bn clothing rental market - one key development will be within baby clothes. Given how fast young children grow, it can be very expensive for parents to keep buying new clothes - hence why many families rely on hand-me-downs from loved ones.

Another issue facing the industry is 'fast fashion' - online retailers are already making efforts to improve this by introducing product lines made from recycled materials. Half of consumers globally do in fact believe that fast fashion can be sustainable, however the onus is on brands to make it happen.

IN YOUR OPINION, WHOSE RESPONSIBILITY IS IT TO DRIVE FORWARD SUSTAINABILITY IN THE FASHION INDUSTRY?



The next few years will see far more celebrity endorsed lines made from more environmentally friendly materials, and chemical-free manufacturing - however, one big change could be an increase in local supply chains. We may start seeing warehouses moving away from the likes of China and India towards the UK and other European countries.

The Food & Bev industry

One key theme we can expect is that the line between what's good for us and what's good for the planet will disappear; consumers may even start to acknowledge 'sustainable' products as both environmentally friendly and healthy for our bodies - whether that be down to the use of chemicals in packaging, where ingredients come from, or simply manufacturing processes.

This means that they will begin to favour products with multiple benefits - not simply recyclable or organic but both - putting added strain on brands. Once again, companies who understand how different consumers define sustainability and what's an 'ethical' product, will have a distinct advantage. It's not enough to focus on one area of improvement, especially when it comes to food, but can brands keep up with demand?

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I did not care where and how the vegetables or peanuts are grown. Since I paid more attention to the price and this is rather cheap, I estimate that in production, sustainability played a more subordinate role.

Female, 24, Germany



Dorothy Shaver

**Global Sustainability Lead
Knorr**

“Although consumers are more aware of the impact of their choices, they are not willing to sacrifice quality or, in most cases, price. This requires businesses to work together with partners, technology and experts to invest in better practices, ingredients and materials. Together we can and need to do better for human and planetary health.”

The personal care industry

Forget cotton buds and face wipes - sustainability will bring even bigger changes for the personal care industry. The products we choose to put on our body can take more consideration than what we put in them - and they often require a greater level of personalisation.

In the past few years we've seen brands launch with their mantra being focused on 'sustainability' and 'natural' ingredients - Victoria Beckham Beauty for example - but what consumers really want is transparency. This is why new supply chain tools and solutions - Blockchain, for example - will be a major player within the personal care industry in the coming years. This is necessary to cut through all the bold marketing claims; consumers will be able to see whether a product really is vegan, cruelty free, recyclable, coral reef safe, etc instantly. Their understanding of a brand and their products will go much further than skin deep.

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I've made small steps, eg. using bar soaps (made by local businesses) so no plastic like with the liquid shower gels. There are places that will offer refills for your used plastic shampoo/shower gel bottles. But this is more of a hassle for me and I'm happy to use bar soaps instead.

Female, 32, UK

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An example would be using 'halo pads' to clean my face rather than face wipes. I'm trying to reduce the amount of wet wipes I use - these halo circles remove makeup and are able to be washed.

Female, 26, Australia



Sustainability and COVID-19

The COVID-19 pandemic turned the whole world on its head. People everywhere were forced to adapt to prolonged lockdowns, social distancing restrictions, and the emotional turbulence caused by the virus.

During the first wave of lockdowns, air pollution levels plummeted in the world's biggest cities. While the environmental benefits were expected to be shortlived, given the temporary nature of the restrictions, it opened consumers' eyes to the drastic impact humans are having on the world.

In fact, 34% of consumers globally reported changing their sustainability habits as a direct result of the pandemic.

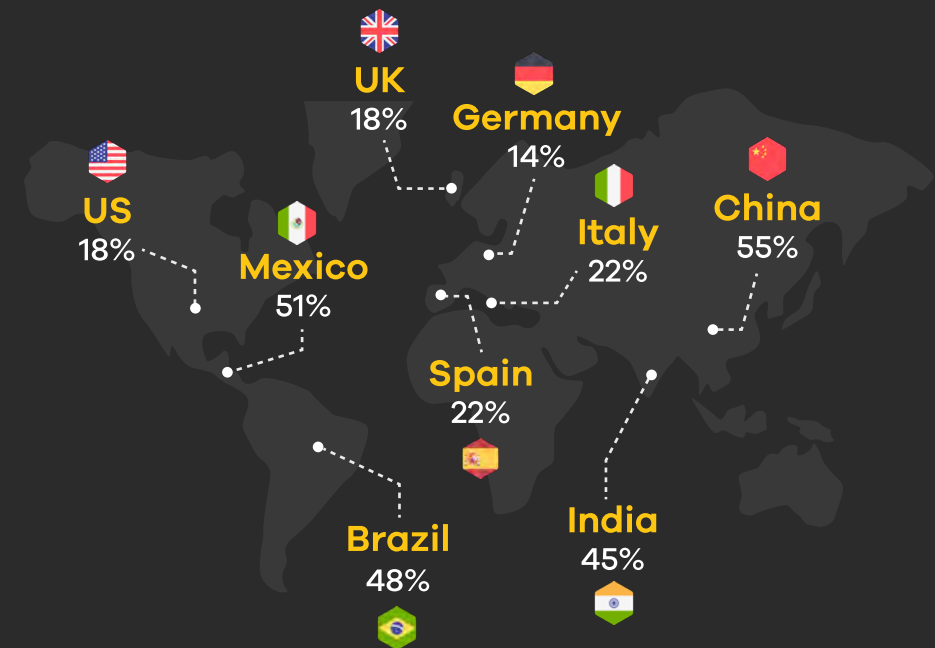
Interestingly, there were some significant differences when looking across markets. Western countries, particularly Europe and the US, saw the least change - with around 1 in 5 adopting different habits.

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After the coronavirus outbreak, the use of medical devices has doubled. If degradable and renewable materials are used, the pollution to the environment will be much smaller.

Male, 23, China

PROPORTION WHO SAY COVID HAS IMPACTED THEIR SUSTAINABILITY HABITS



Other countries, particularly those often thought of as more 'developing' markets like India and Mexico, have seen a far more drastic shift with about 1 in 2 changing their behaviour.

While the proportion of people adapting their routine varies, the actual changes remain pretty consistent. The number one change people have made in relation to sustainability is that they increased their recycling efforts, following by greater overall awareness of products and consumption. Despite the majority of changes being positive, 5% of those in Western countries actually admitted to recycling less than they did pre-pandemic.

The long term impact on consumers' actual behaviour remains uncertain, but it is clear is that we're seeing far greater awareness around waste and the environmental impact of us as individuals.

As consumers continue to demand higher ethical standards from the companies they buy from and support, brands will need to find new ways to communicate in order to remain relevant.

What Streetbees Provides

- 1** Real, in-the-moment behaviour capturing full context and emotions
- 2** Consumers own words, analysed with advanced NLP to eliminate bias
- 3** Agility and proactiveness, uncovering opportunities to drive growth

If you're interested in learning more about how to build a strategy for your brand and the categories you operate in:

BOOK A DEMO





Streetbees helps the world's leading brands grow by building an Always ON connection with consumers.

Observe the moment of truth

Real life behaviour captured at the moment a consumer makes a decision. Never rely on claims.

Get close to consumers at scale

Access rich data with photos and videos from millions of demographically representative consumers.

AI driven growth

Streetbees identifies hidden growth opportunities by applying AI to millions of real life observations from real consumers.

3.5 Million

BEES

2.5 Billion

DATA POINTS

190

COUNTRIES

MARKET LEADING BRANDS USE STREETBEES TO UNLOCK GROWTH



L'ORÉAL®



MARS

BBC

GET IN TOUCH



Streetbees' Solutions



Dynamic Growth Engine



Brand Experience Monitor



Dynamic Media Landscape