

**KANTAR**

What do 5 years of  
search engines  
requests worldwide  
teach us about  
sustainability trends?



Central & Southern Europe webinar  
March 31<sup>st</sup>, 2022

Increase your ability  
to be the enabler of  
change by understanding  
**the consumers'**  
**expectations** in  
your category



**Pierre Gomy**  
Head of Marketing  
Central & Southern Europe  
Kantar Insights

**We are happy to share this moment with you**



**Corinne Mostaert**

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Insights



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Deputy Head of Analytics -  
Central & Southern Europe -  
Kantar Insights

# We hope today's agenda will inspire you

**Brands as enablers of change** - Towards a more sustainable living



**Sustainability Sector Index**

What sustainability means in your category?

**Making Sustainability more tangible** by connecting to spontaneous consumer perspectives



**Sustainability trends**

Keep the pulse by identifying trends from Search engine requests

**Consuming less but consuming better**



**Sustainability trends**

Some key insights from our deep dives in 3 categories: food and beverages, retail and finance

**I fund therefore I am**



How can you **access to the Sustainability trends** data and Insights?



**Sustainability trends**

Deliverables and investments



# Brands as enablers of change toward a more sustainable living



**Corinne Mostaert**

Innovation lead Kantar Belgium /  
Sustainability lead  
Central & Southern Europe  
Kantar Insights

# Kantar's Global Sustainability Sector Index is the fuel to ignite your journey, helping you realise commercial opportunity and navigate where to prioritise

## Burning platforms



Snapshot of the sustainability landscape in your category

## Activations



Behavioural segmentation drives clear understanding

## Consumer behaviours



Spotlight emerging behaviours toward sustainable living

## Unpack value-action-gap



Deep dive into the value-action gap and tension areas

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In 34 countries – 35K respondents

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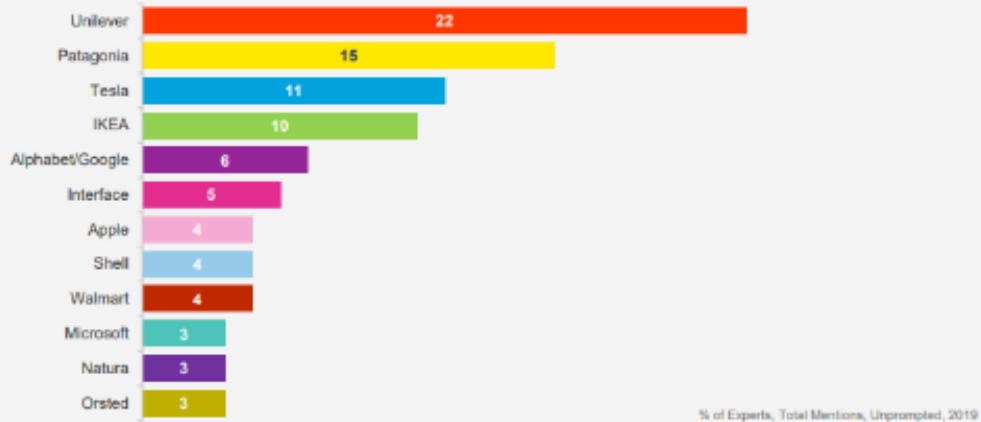
# 2 brands recognised by sustainability experts and citizens as sustainable

## Globescan sustainability experts

### Unilever, Patagonia, Tesla & IKEA seen as top climate leaders

Unilever is seen by experts as a clear leader on climate change, followed by Patagonia, Tesla, IKEA and Alphabet/Google.

**Question:** Which companies do you think are leaders in addressing climate change?  
Please enter a maximum of 3 companies in the spaces provided.



## BrandZ

## Responsibility Index



# What do they have in common



**A vision**

Also called a branded point  
on view on sustainability



**Walking  
the talk**



**Building  
trust**



**Close the  
say-do gap**





The common theme?

# Human-Centric Transformation

# Consumers are actively engaging with sustainability, but...



64%

I worry brands are involved in social issues **just for commercial reasons**



64%

It's difficult to be more environmentally friendly because the products that are better for the environment are **harder to find or more expensive**



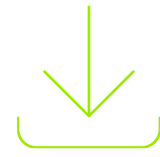
63%

of consumers feel like sustainability **isn't their responsibility** it's up to businesses / producers



61%

I want to do more to be more mindful of the planet and the environment, but my **day-to-day priorities get in the way**



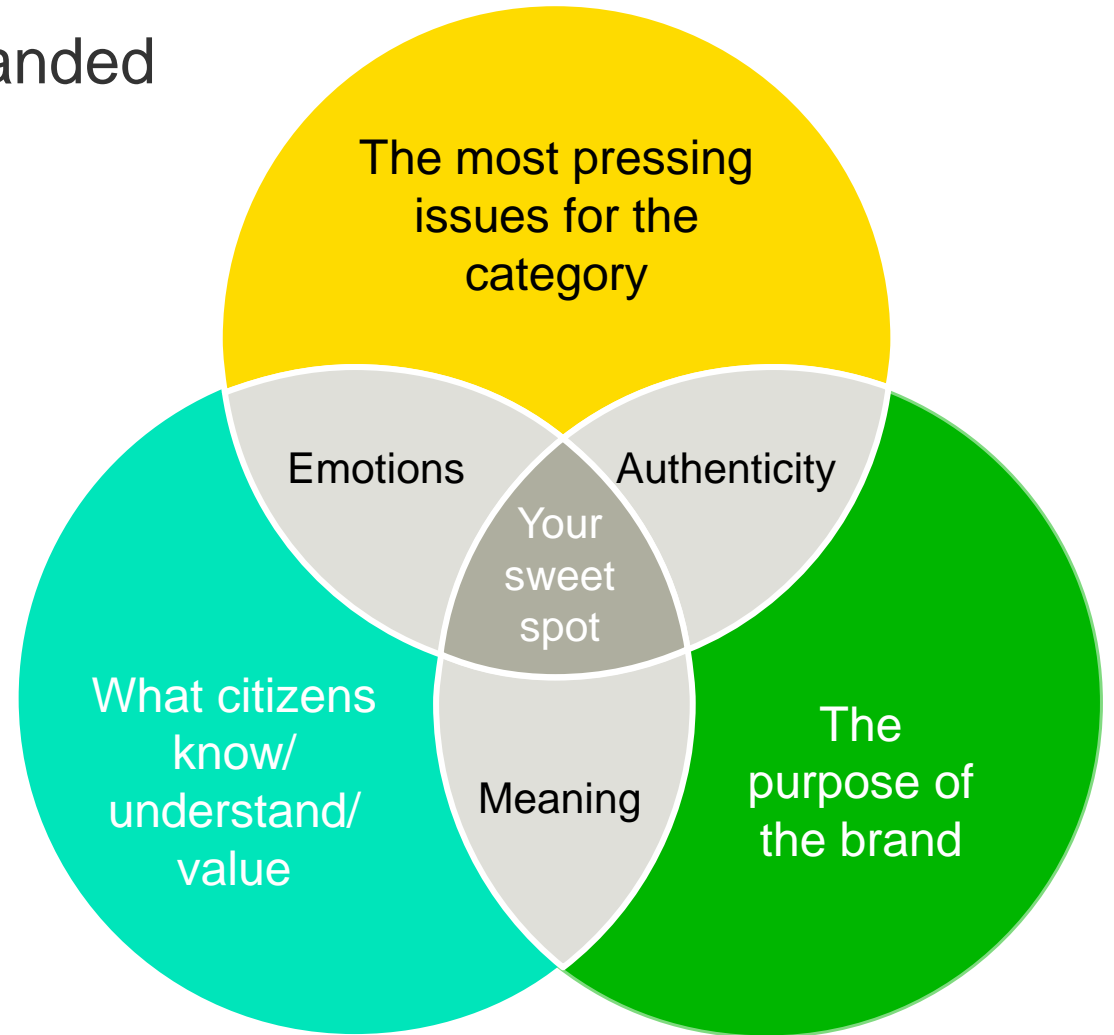
50%

are prepared to **invest time and money** in companies that try to do good



# A vision

Also called a branded point of view on sustainability



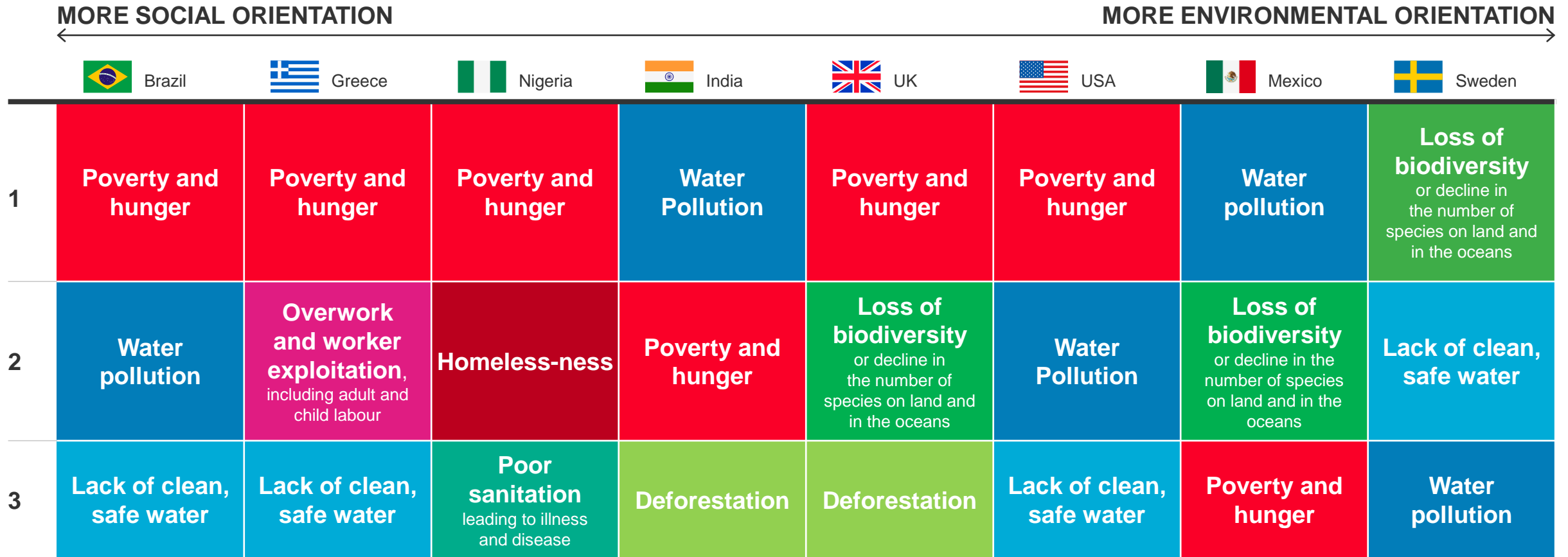
# Be careful using a big share of the marketing budget on small measures that do not affect your company's footprint significantly.

The most pressing issues for the category



If marketing is **focused on the 5%** of your product range labelled as “sustainable”, but the **remaining 95% are causing harm** to the climate, environment and people producing them, you should have concrete plans of changing that ratio drastically.

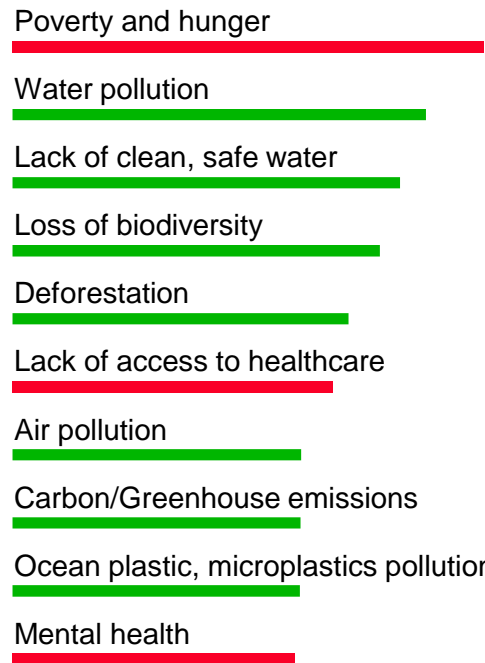
# The perception of how pressing an issue is varies according to the socio-economic context



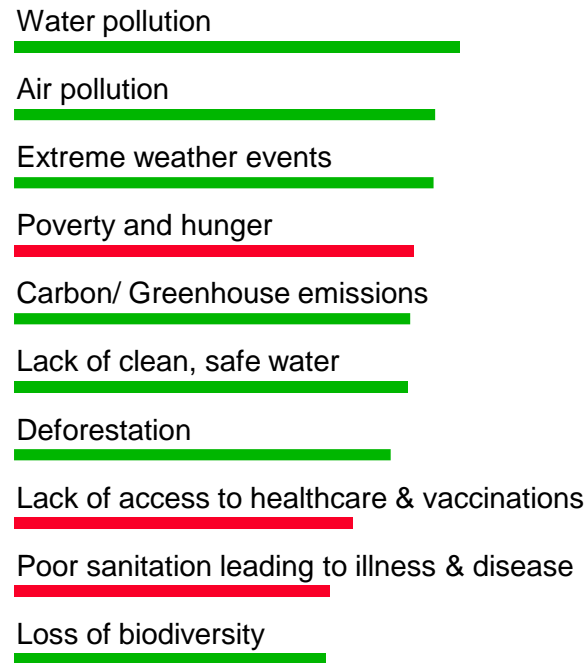
# Poverty and hunger is deemed the most concerning across most regions though in APAC some environmental issues take precedence over this basic human need

## Top 10 Concerns per Regions

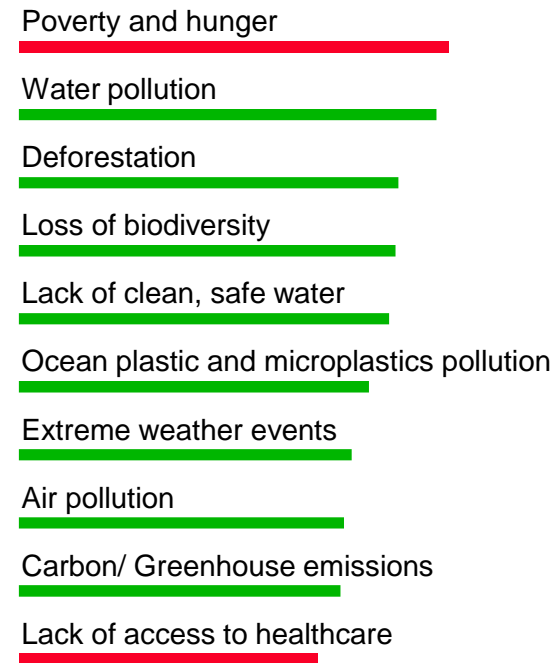
### Americas



### APAC



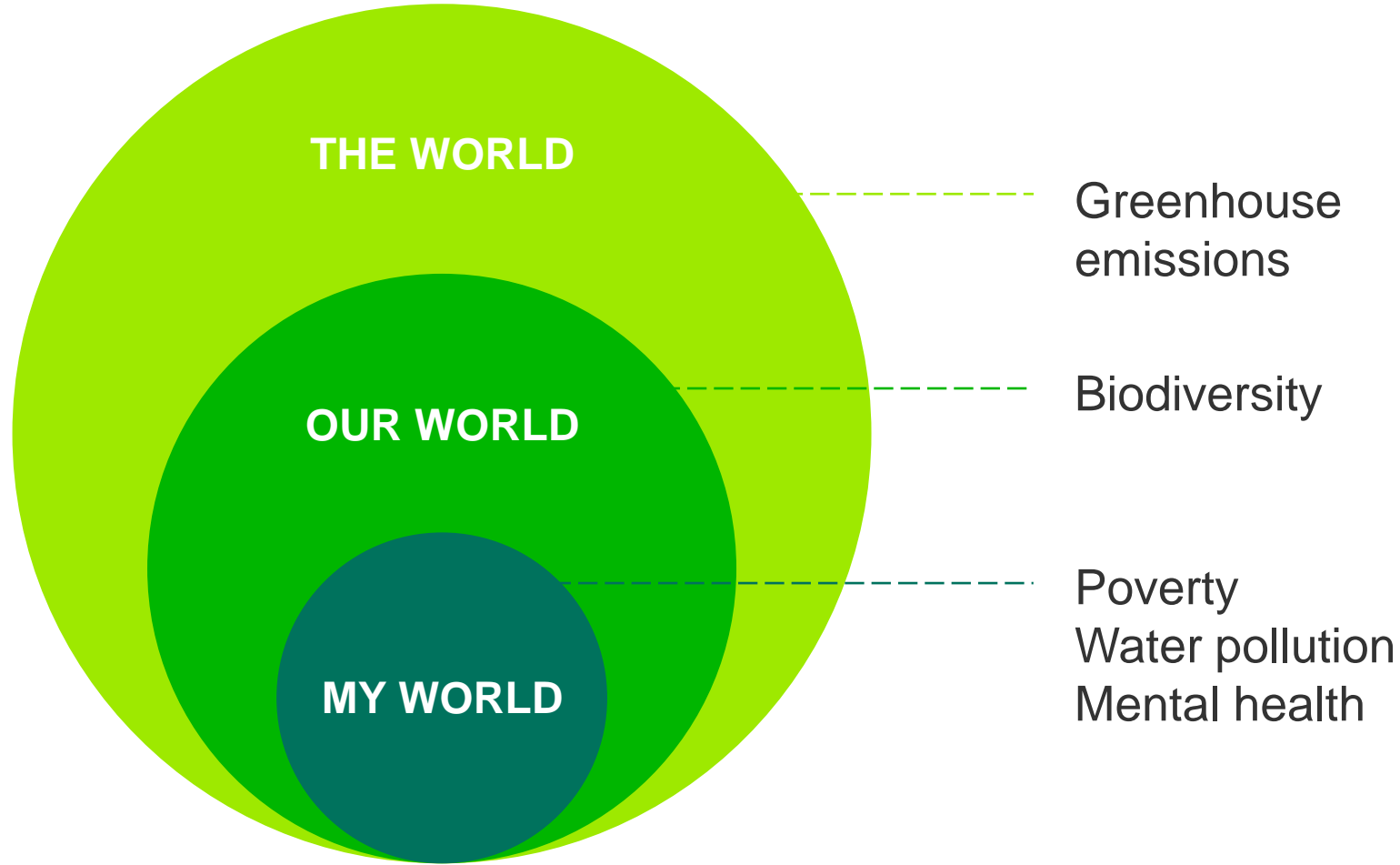
### Europe



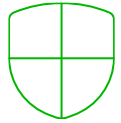
### MEA



# We care for what impacts us directly and is tangible



# Build your 'swords and shields' strategy against issues that matter to customers



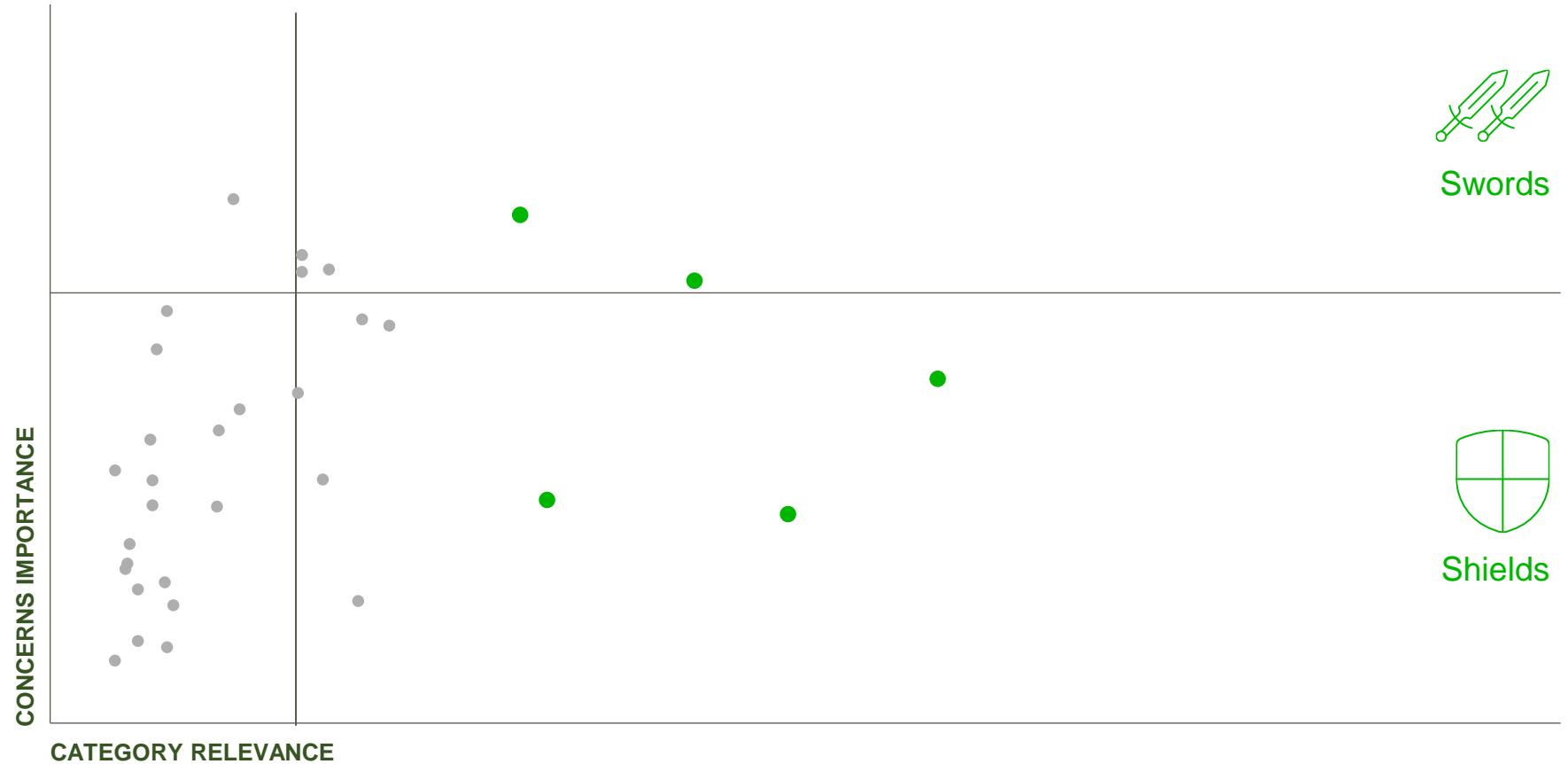
## Shields

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



## Swords

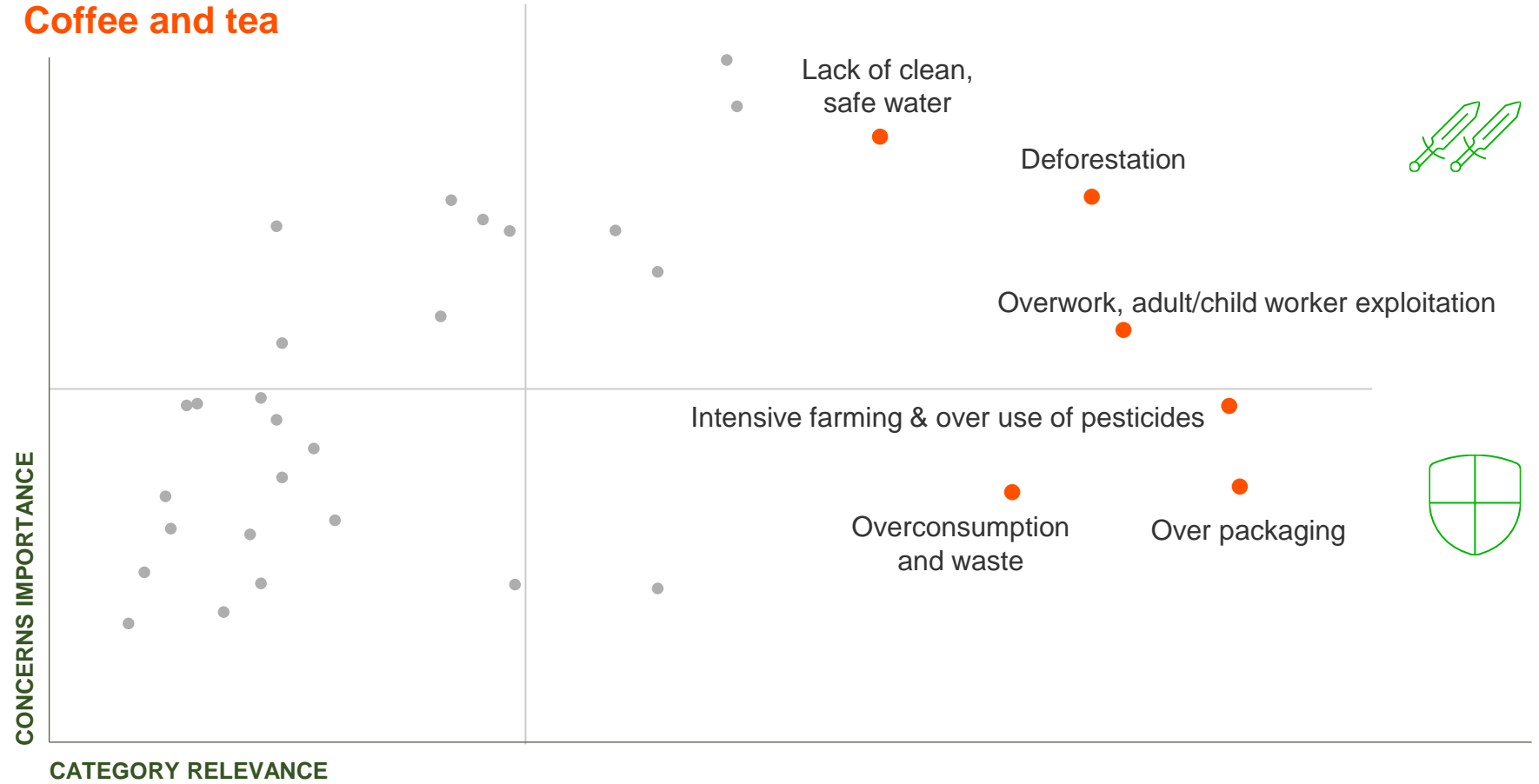
Once the primary drivers are leveraged, these drivers can then further differentiate moving forward (potentially setting trends).



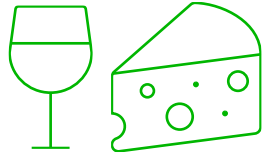




## Coffee and tea



# Detail of the Swords and Shields - Per category



## Food & Beverage

- Animal Testing and Cruelty
- Intensive Farming
- Mental Health
- Overconsumption and Waste
- Overpackaging
- Overwork and Worker Exploitation
- Poverty and Hunger



## Retail

- Global Warming
- Overconsumption and Waste
- Overpackaging
- Overwork and Worker Exploitation
- Tax Evasion



## Finance

- Financial Literacy
- Increasing Economic Inequality
- Poverty and Hunger
- Tax Evasion



## Coffee and tea



ing & over use of

Overconsumption  
and waste

### Coffee and tea

**Which Manifestations are meaningful in your category?**

Health?

Soil pollution?

Inequalities?

**Which solutions that are triggering the attention?**

Zero waste?

Compost?

Reuse?

**To inspire your innovation and communication strategy**



# Sustainability trends

## Keep the pulse

Making Sustainability **more tangible** by connecting to **spontaneous consumer perspectives**



**Fabio Da Col**

Head of Analytics &  
Kantar Marketplace - Italy



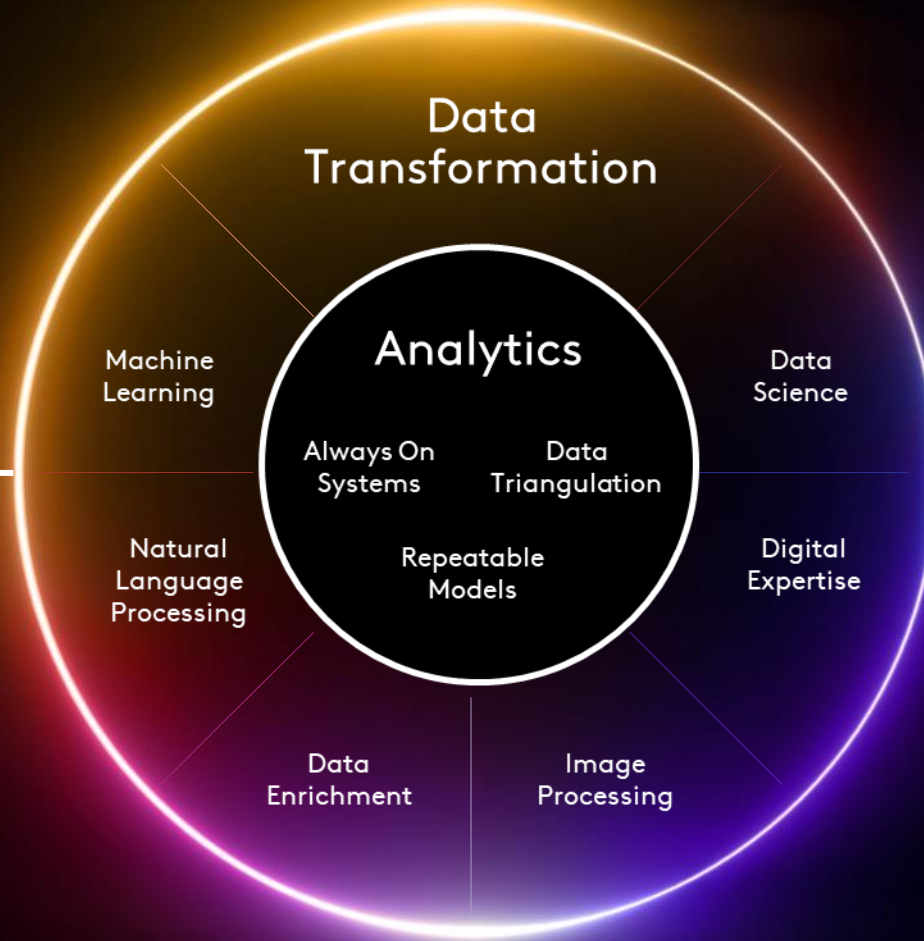
# From

A static, overly generic and marketer-centric approach to understanding sustainability, not built with tomorrow in mind – merely ‘point in time’

# To

A dynamic and people-centric understanding leveraging the scale and breadth of digital data to identify how things are evolving

# The right data for the right issue

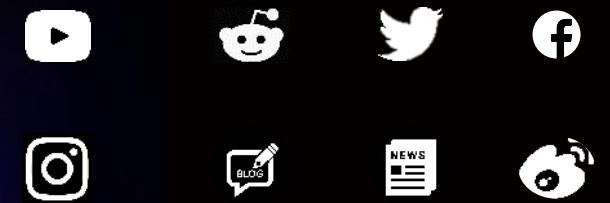


# The right data for the right issue

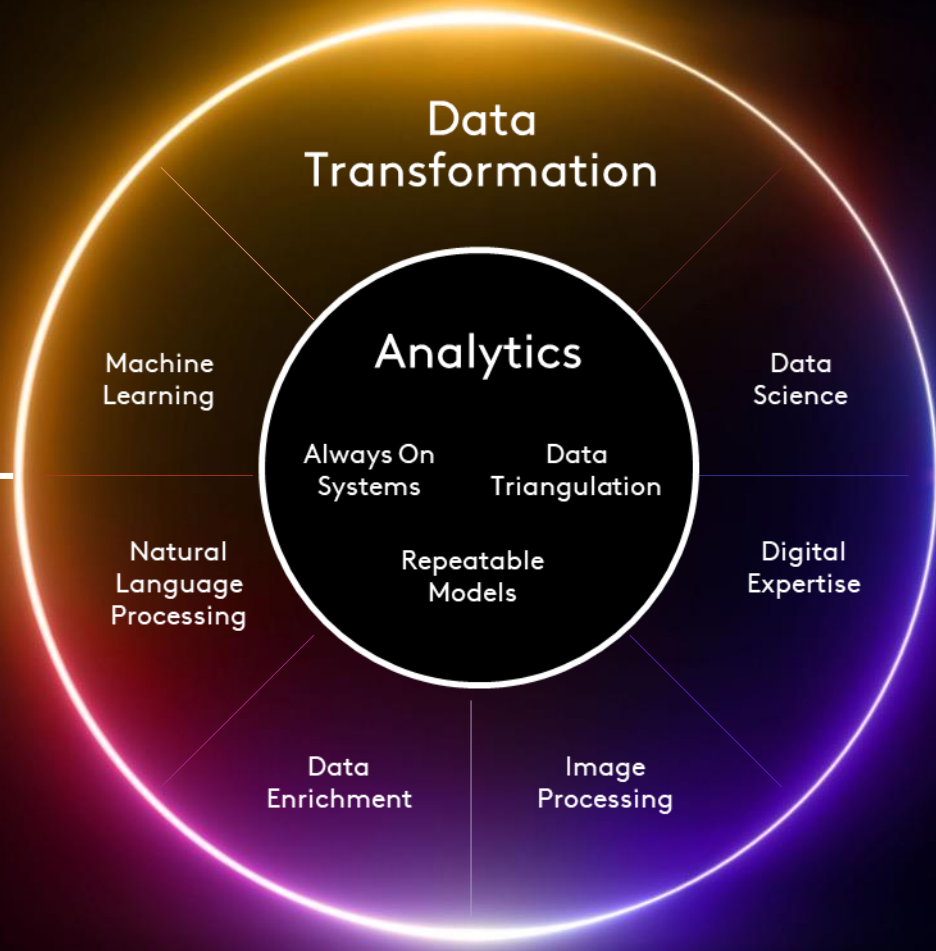
## SEARCH



## SOCIAL



## ERETAIL & REVIEWS



## DIGITAL MARKETING TOOLS



# THE POWER OF SEARCH

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SCALABLE



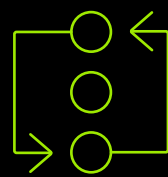
UNBIASED



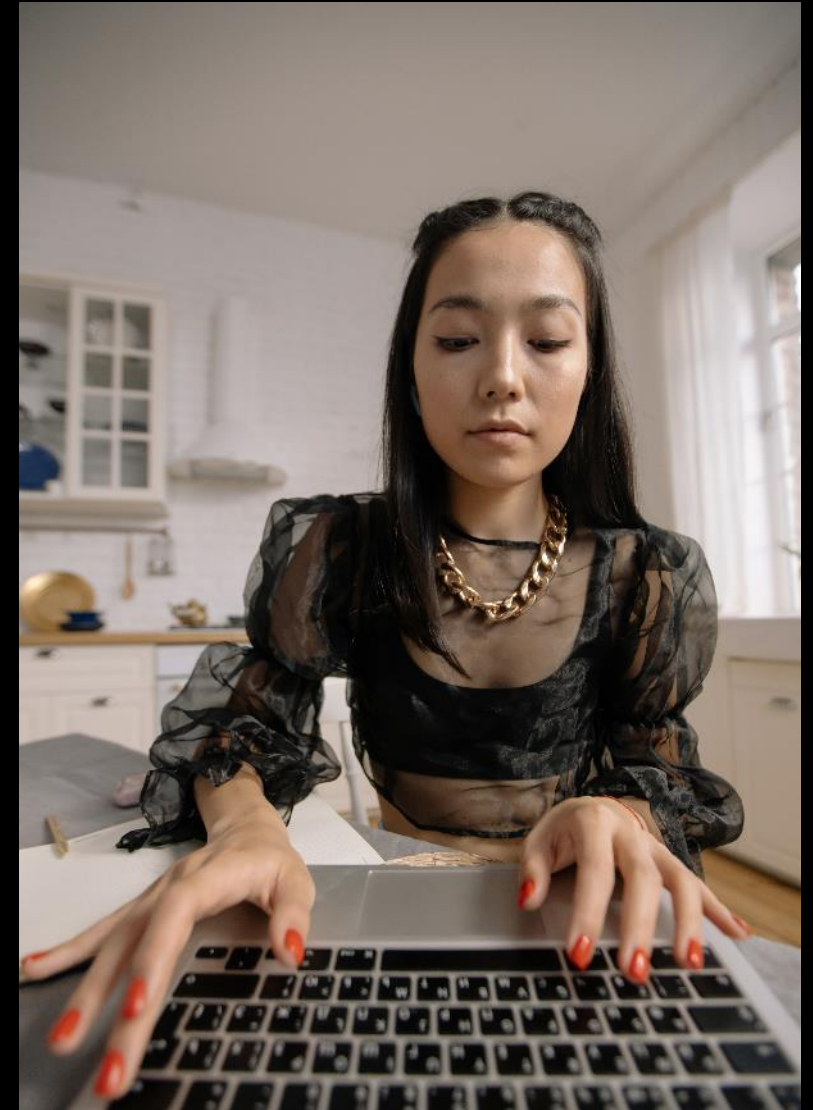
REAL-TIME



PREDICTIVE



VALUE  
ACTION GAP



# TRENDS 3.0

## REAL MIX

Real mix of ongoing data sources & true human understanding to deliver meaningful insights and solutions.



Powered by a data analytics engine. But combined with a network of insights, brand & innovation experts who can synthesise & track patterns, contextualise insights & rapidly define the most appropriate response.

# SNAPSHOT OF THE APPROACH

Search Data (Google)  
Worldwide Coverage (excl. China)  
3 Categories: Food & Beverage –  
Retail – Finance  
March 2017 – March 2022

SDG FRAMEWORK  
TOP - DOWN



CONSUMER  
PERSPECTIVE  
BOTTOM - UP

## FRAME

### SWORDS & SHIELDS

- What consumers expect from the categories?

## DIVE

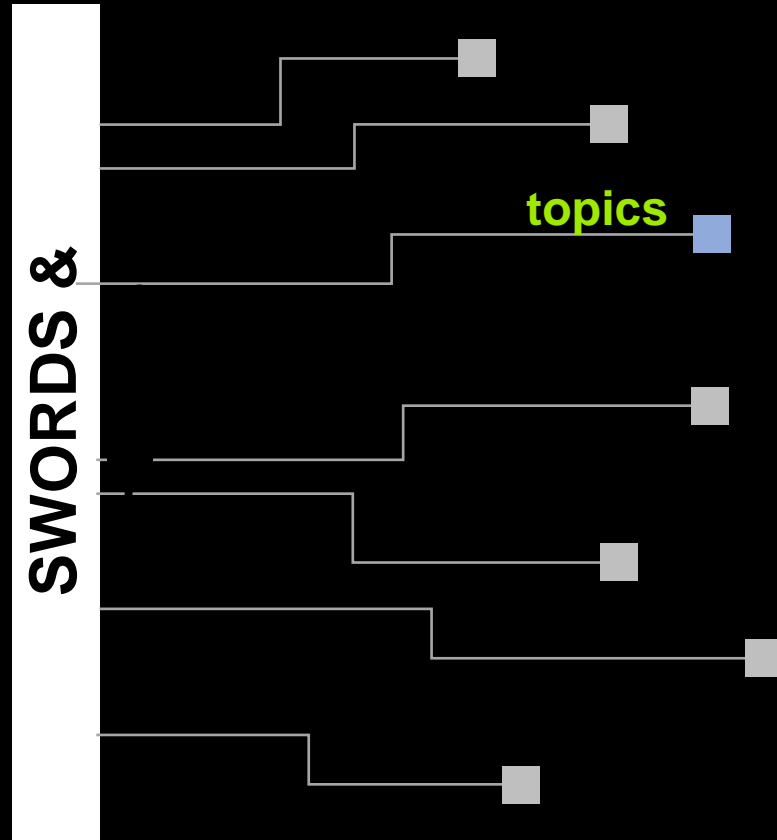
### SEARCH DATA

- How are consumers searching around key sustainability topics? What do they care about?
- What are the sustainability topics gaining momentum?
- What are the micro subjects driving growth and potentially disrupting the landscape?

# Focus on the Framework

## SWORDS & SHIELDS

Swords & Shields are the umbrella groups for all topics. They are the base of the structuration of all the consumers' searches collected.



## TOPICS

They are based on a taxonomy of areas defined by the way consumers are organically searching around tires. They are composed by Individual queries - the keywords consumers are effectively using.

### TIME PERIODS

Short Term	6 Months
Mid Term	1 Year
Long Term	2 Years

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MAKING THEORY TANGIBLE

SUSTAINABILITY  
TRENDS  
KEEP THE PULSE

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**3** CATEGORIES  
**7.6 BILLION** DATA POINTS  
**12 963** TRENDS EVALUATED  
**360** TOPICS COVERED  
**5** YEARS OF DATA



# DEMAND SIGNALS TRENDS FRAMEWORK

**DISRUPTIVE**

STRONG MOMENTUM  
WEAK CROWD

**MAINSTREAM**

STRONG MOMENTUM  
STRONG CROWD

**NICHE**

WEAK MOMENTUM  
LOW CROWD

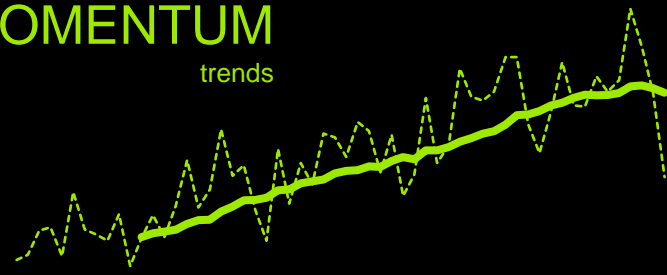
**ESTABLISHED**

WEAK MOMENTUM  
STRONG CROWD

# NATURE OF TRENDS

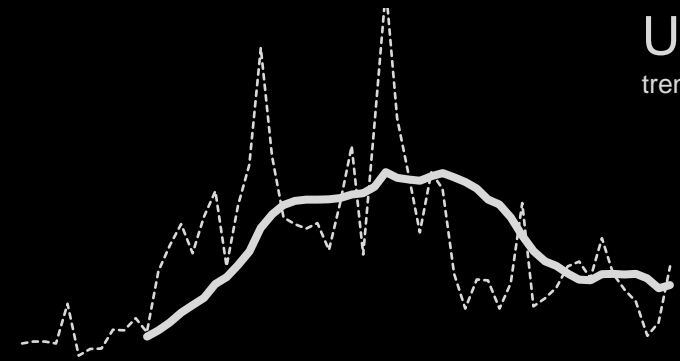
# READING KEY

**MOMENTUM**  
trends



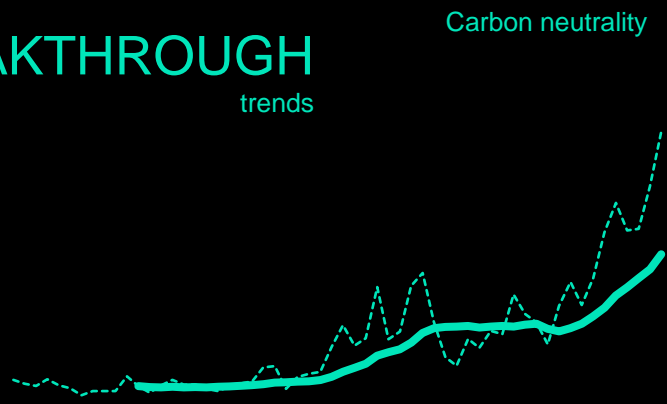
Biodegradable Waste

**U-TURN**  
trends



Microplastics

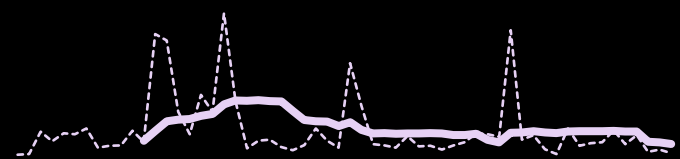
**BREAKTHROUGH**  
trends



Carbon neutrality

Water scarcity

**SPIKES**  
trends



Diving into  
the key  
learnings





What new  
normal is being  
built around  
sustainability?

1

DEGROWTH IS  
NO LONGER A  
DIRTY WORD

2

CONSUMING  
BETTER IS A  
FACT

3

FINANCE AS  
A LEVER



# Consuming less but Consuming better



**Patricia Flores**  
Deputy Lead  
Brand Strategy & Guidance  
France Kantar Insights

# Consuming less, consuming better

**1** SHOPPERS BECOME  
MORE MATURE AND  
ACTORS OF CHANGE

**#1 overconsumption & waste**

**#2 overpackaging**

**#3 global warming**

**246M** | -5%\*

14M | +71%

13M | +8%\*

\*Long term growth (eg 2 years)

# Consuming less, consuming better

**1** SHOPPERS BECOME MORE MATURE AND ACTORS OF CHANGE

#1 overconsumption & waste

**246M** | -5%\*

#2 overpackaging

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**2** CONSUMERS SHOW A RISING INTEREST / CONCERN IN OVERCONSUMPTION AND WASTE IN FOOD & BEVG.

#1 animal testing & cruelty

155M | -4%\*

#2 mental health & cruelty

42M | +4%\*

#3 Poverty & Hunger

17M | +9%\*

.....

#7 overconsumption & waste

**3M** | **+27%\***

\*Long term growth (eg 2 years)

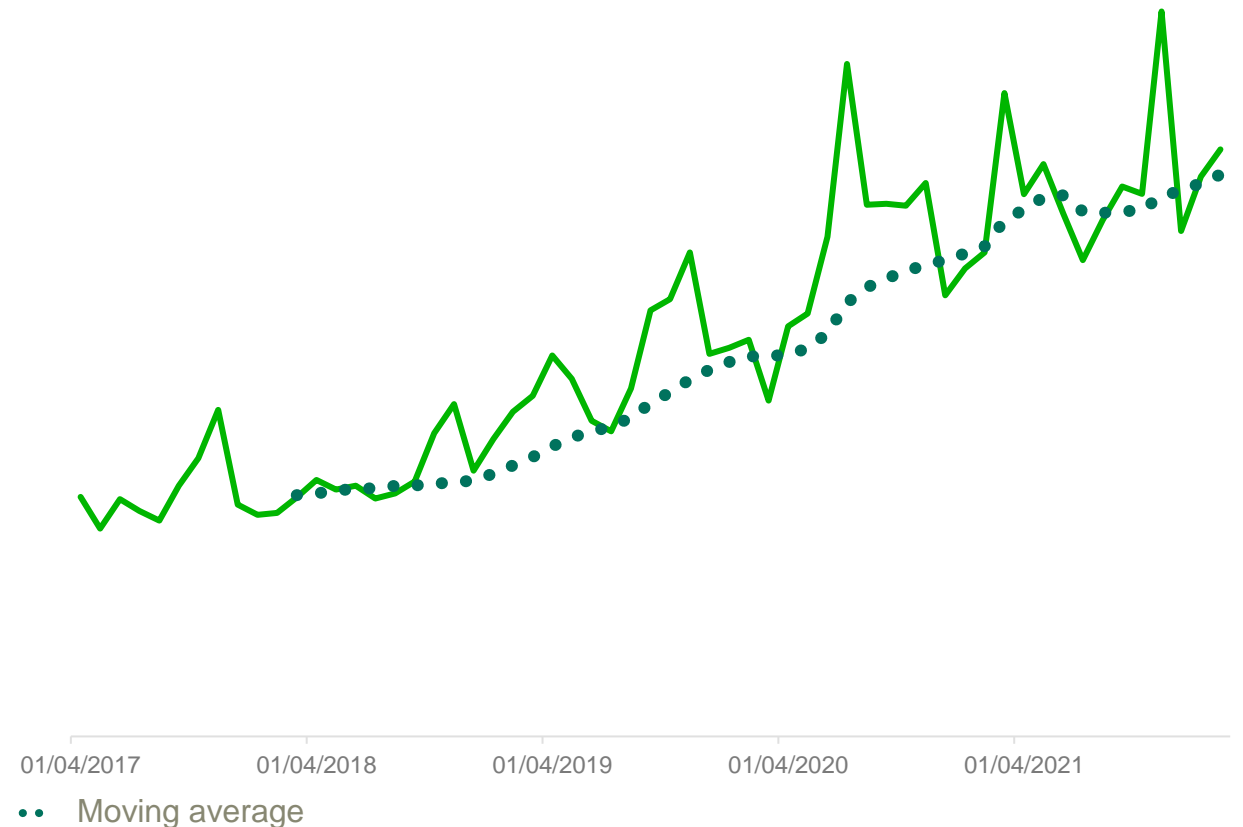
# Fast-fashion embodies this race to over-consumption

Consumers are looking for information to know whether a brand is **FAST-FASHION** or not

*“What are the fast fashion brands?  
Is Zara a fast fashion brand? Shein?  
Cider? Gap? H&M? AliExpress...”*

To be able to shop AND act consistently vs. their values

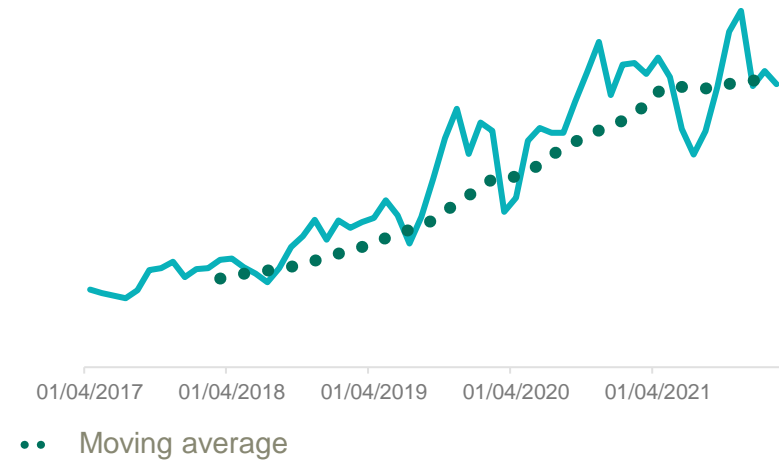
WHILE being more and more reactive to greenwashing



# And the shoppers act more and more to counter fast-fashion excesses

Circular economy and second hand are becoming mainstream

## Vinted



# And the shoppers act more and more to counter fast-fashion excesses

Circular economy and second hand are becoming mainstream

# Vinted

•• Moving average



•• Moving average

It comes along with concepts of

**SLOW LIVING** (+52%)

**DURABILITY** (+31%)

**SOBRIETY** (+5%)

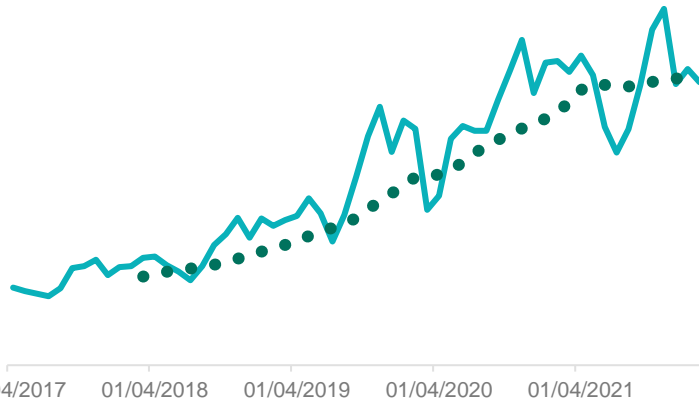


**patagonia**  
patagonia.com

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Circular economy and second hand are becoming mainstream

## Vinted



•• Moving average

It comes along with concepts of  
**SLOW LIVING (+52%)**  
**DURABILITY (+31%)**  
**SOBRIETY (+5%)**



And **reinvesting in human** through more respect  
**+86%** of long-term growth in searches for Uyghur

## #FreeUyghurs

Searches:

*Uyghur brands list*  
*Addidas, Puma, Nike,*  
*Uniqlos, Zara*  
*Uyghur problem easy*  
*to understand*



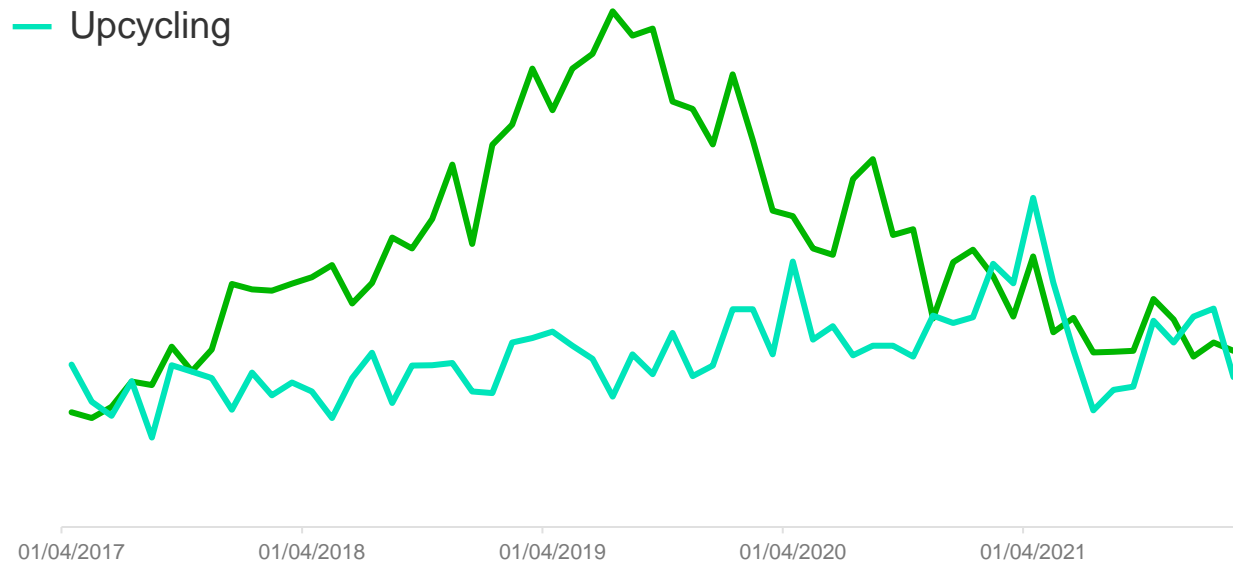
# As of better consuming...

## It is less about having 0 waste, and more about being better at it

### ZERO WASTE, BIODEGRADATION

have been losing interest  
in food & beverages categories

- Zero waste
- Upcycling



\*Long term growth (eg 2 years)

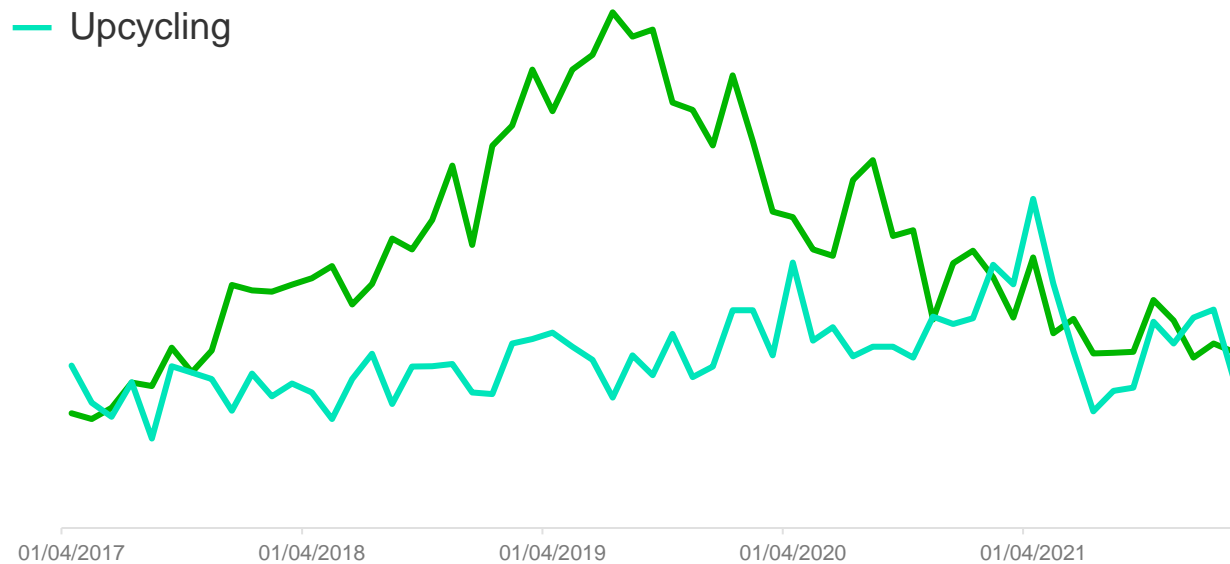
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have been losing interest  
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Whereas circular economy,  
waste management and  
upcycling are gaining  
momentum

**FOOD WASTE**

+44%\*

**COMPOST**

+38%\*

**UPCYCLING**

+22%\*

**CIRCULAR  
ECONOMY**

+15%\*

**WASTE  
MANAGEMENT**

+15%\*

\*Long term growth (eg 2 years)

# A second life after the last sip

TRUE FRUITS BENEFIT FROM A RISING INTEREST FROM CONSUMERS (+8%)

# true fruits



Il y a une  
vie après  
le smoothie



ACTUALITÉS STARTUPS #ÉCONOMIE CIRCULAIRE #RECYCLING

**Les smoothies « true fruits » lancent une gamme de bouchons d'upcycling**

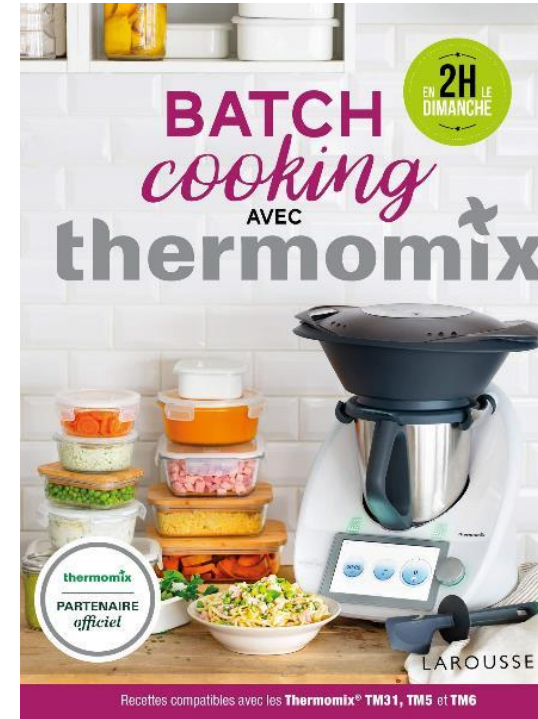
Par PEGGY BARON - Le 29 novembre 2021

© fourfotodigital - gotty

# Cook clever & waste less

## Embed waste management into quality life and wellbeing

When integrated in their daily life and concerns (save time, save money, convenience...) consumers have less barriers to act and consume in a more sustainable way



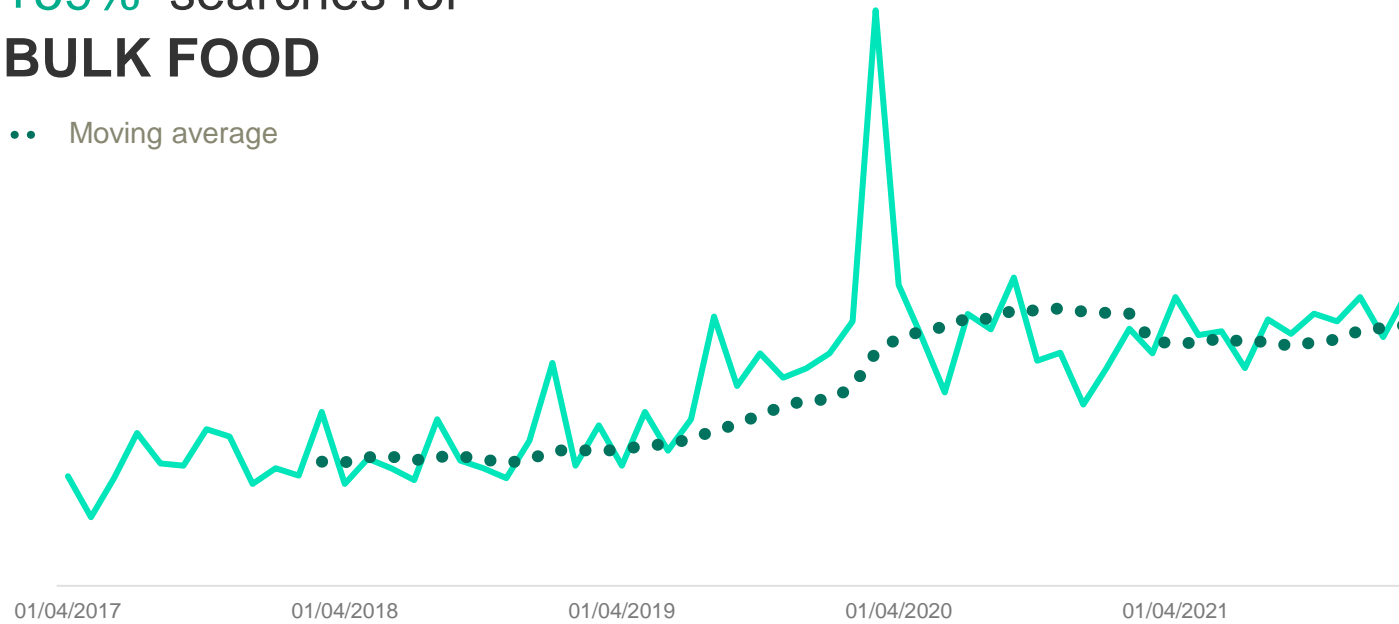
+131%\*  
searches for  
**BATCH  
COOKING**

\*Long term growth (eg 2 years)

# Bulk becomes a key alternative to counter both waste and overpackaging...

**+59%\*** searches for  
**BULK FOOD**

•• Moving average



Among Searches:

*Where to buy bulk food?*

*Bulk store near me*

*Bulk restaurant*

*Bulk food online?*

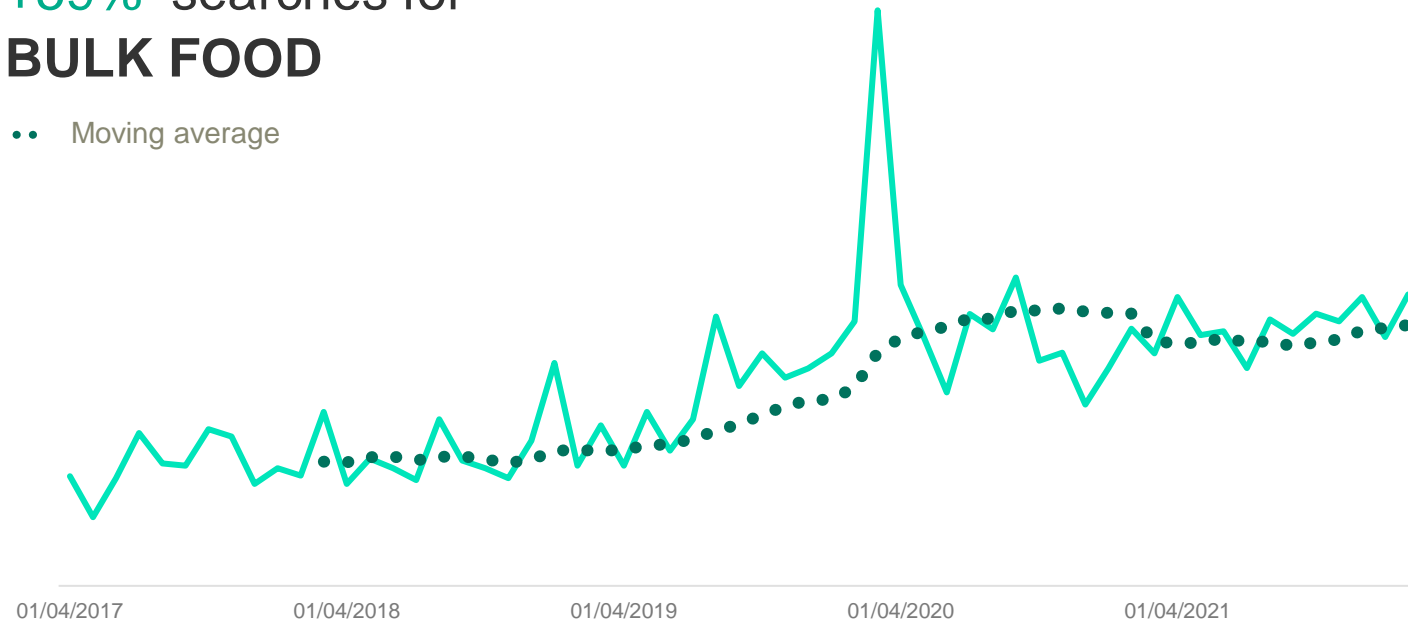
*Costco, Walmart, Amazon*

\*Long term growth (eg 2 years)

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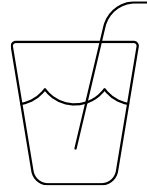
... But is also a challenge for the Brands



## Alternative to plastic remain a strong focus

4,5 millions searches for **STRAWS**

Consumers more looking for alternatives and how brands can provide them with solutions



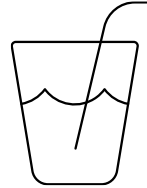
\*Long term growth (eg 2 years)

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## EDIBLE STRAW

The edible apple straw is eco-responsible and 100% biodegradable.



## SUGARCANE STRAW

Based on sugercane fiber (waste)



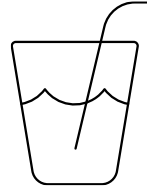
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\*Long term growth (eg 2 years)

# Beverages and especially Waters in the spotlight on plastic concerns and alternate solutions

8 millions + of searches for **WATER DISPENSERS** and growing (+13%\*)



01/04/2017 01/04/2018 01/04/2019 01/04/2020 01/04/2021

•• Moving average

\*Long term growth (eg 2 years)



Consumers emerging queries:  
*Brands: Locca, Sterra, Wells, Ruhens, Brio, avalon, ...*  
*Hands free water dispenser*  
*Electric water dispenser*  
*Automatic water dispenser*

## But this is a journey



+30%\* searches for  
**ALTERNATIVE FOR  
PACKAGING**

But small volume yet

Consumers do not show maturity yet in  
this field

(no specific brand emerges in search)

Leaving room for brands to innovate and  
propose meaningful solutions that can be  
easily integrated in consumers' daily life

\*Long term growth (eg 2 years)



I fund,  
therefore I am

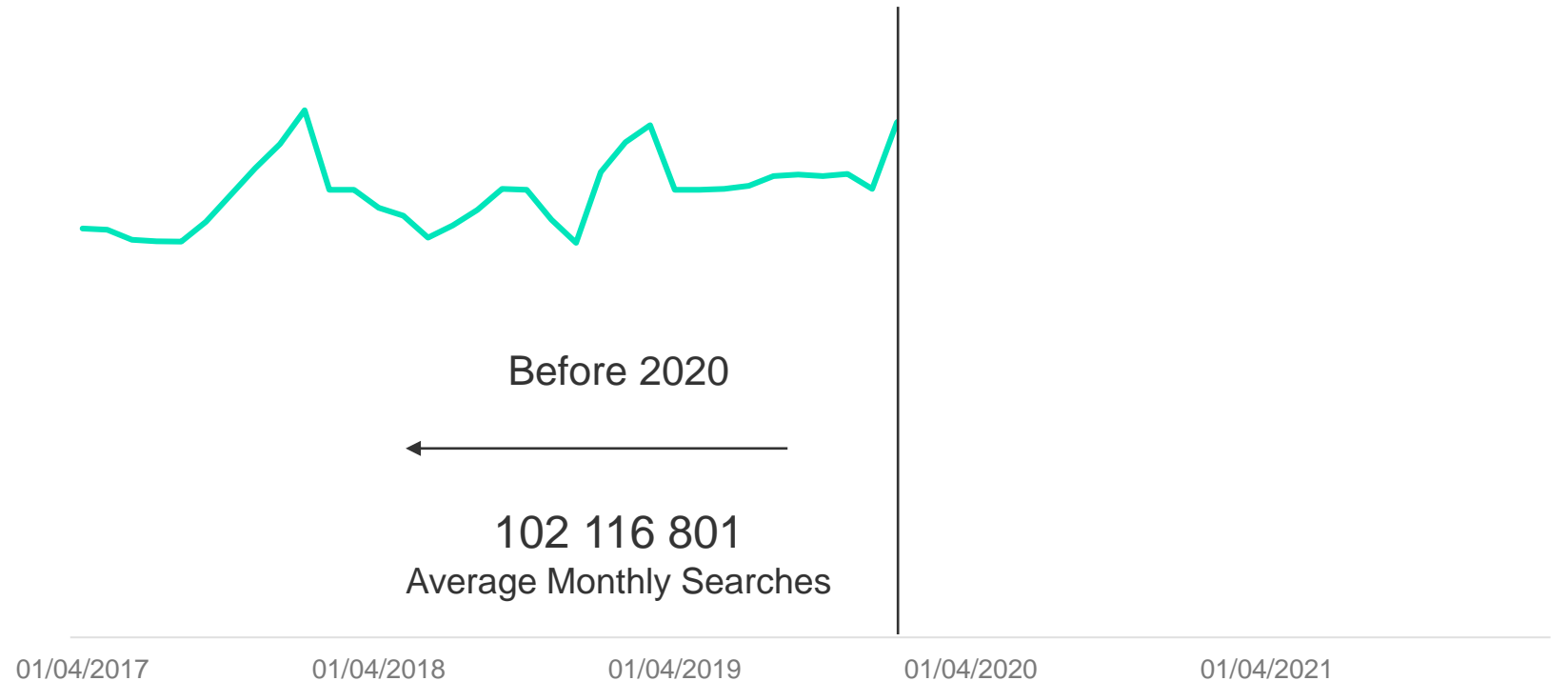
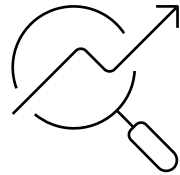


**Roman Ptaszynski**

Deputy Head of Analytics  
Central & Southern Europe  
Kantar Insights

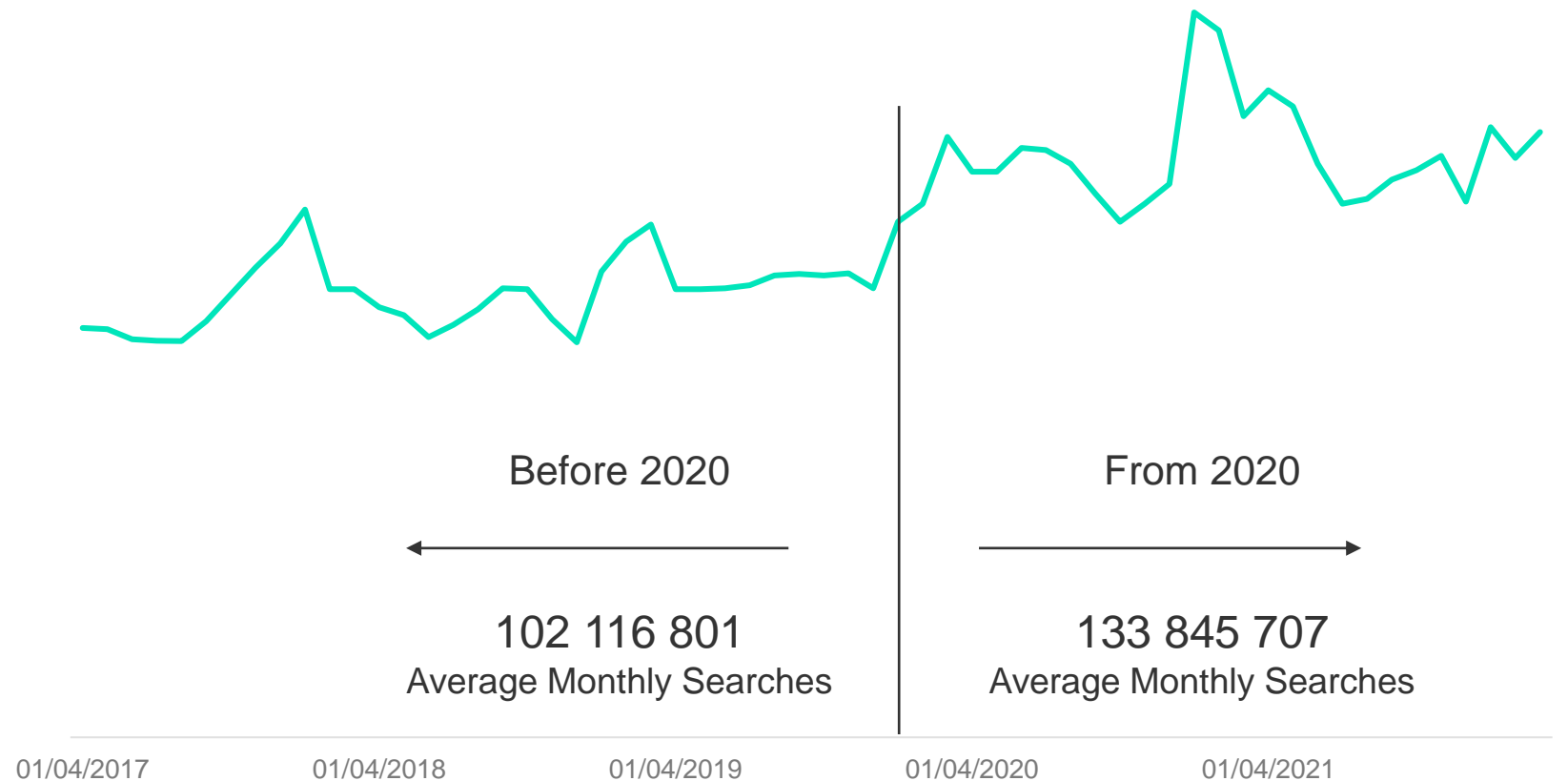
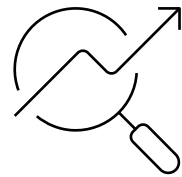
# FINANCE AND THE USE OF THEIR MONEY

is an increasingly  
central issue for  
consumers



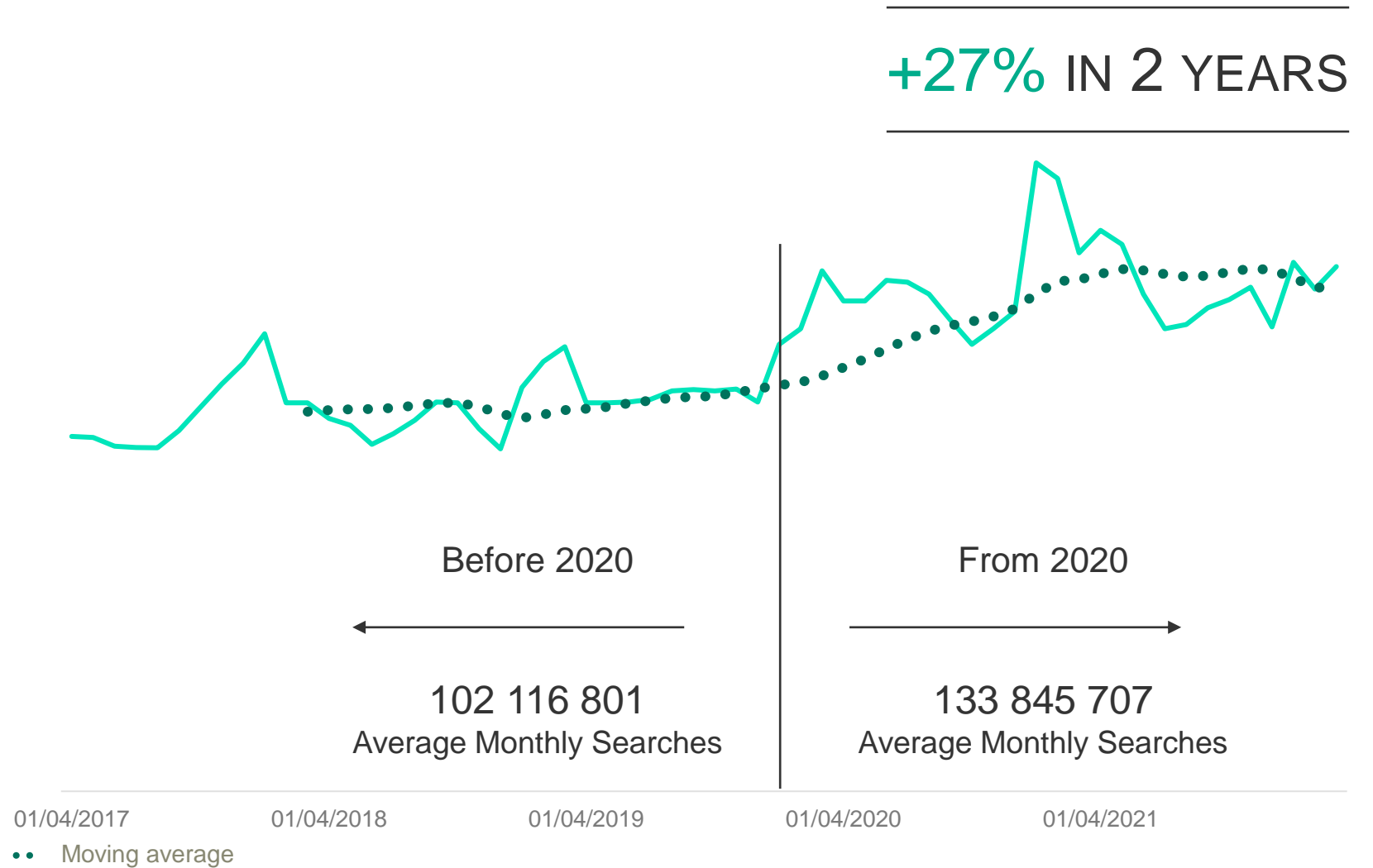
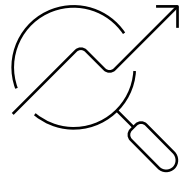
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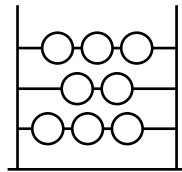


# FINANCE AND THE USE OF THEIR MONEY

is an increasingly central issue for consumers



With the  
search for  
**PROFITABILITY**  
logically always  
at the heart



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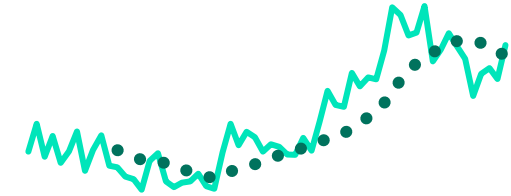
## SOCIAL TRADING

150K  
+101% in 2 Years

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*“High yield savings  
account”* + 81%

*“Savings account  
interest rate”* +40%



•• Moving average

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## SAVINGS ACCOUNT

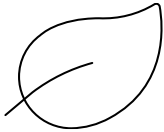
39 Million  
+11% in 2 Years

---



# SUSTAINABILITY

already a reality  
in investment  
strategies

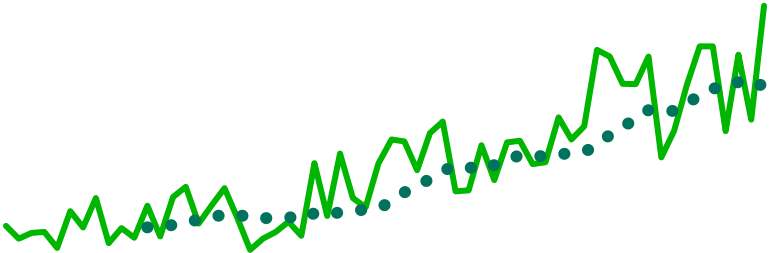


## ECO-INVESTING

56K

+79% in 2 Years

+31+ in 1 Year

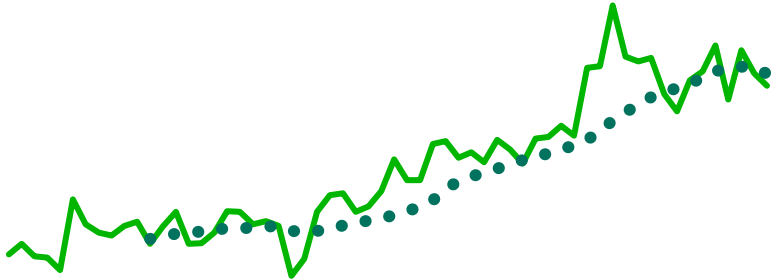


## SOCIALLY RESPONSIBLE INVESTING (SRI)

434K

+82% in 2 Years

+21+ in 1 Year



•• Moving average

# But navigating this ecosystem is a real challenge



## Money managers face 'greenwashing' scrutiny as sustainable funds flourish



SAVE AND INVEST

## Why 'greenwashing' is an issue for sustainable investments—and how to avoid it

BUSINESS

TIME

## Thinking of Investing in a Green Fund? Many Don't Live Up to Their Promises, a New Report Claims

# Environmental Social Governance

1,35Million  
+260% in 2 Years  
+42% in 1 Year

KANTAR

## Sorting the waste from the nuggets

Top related  
Queries

- 1 "Commerzbank share esg"
- 2 "MSCI"
- 3 "ESG investing"

# Environmental Social Governance

1,35Million  
+260% in 2 Years  
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KANTAR

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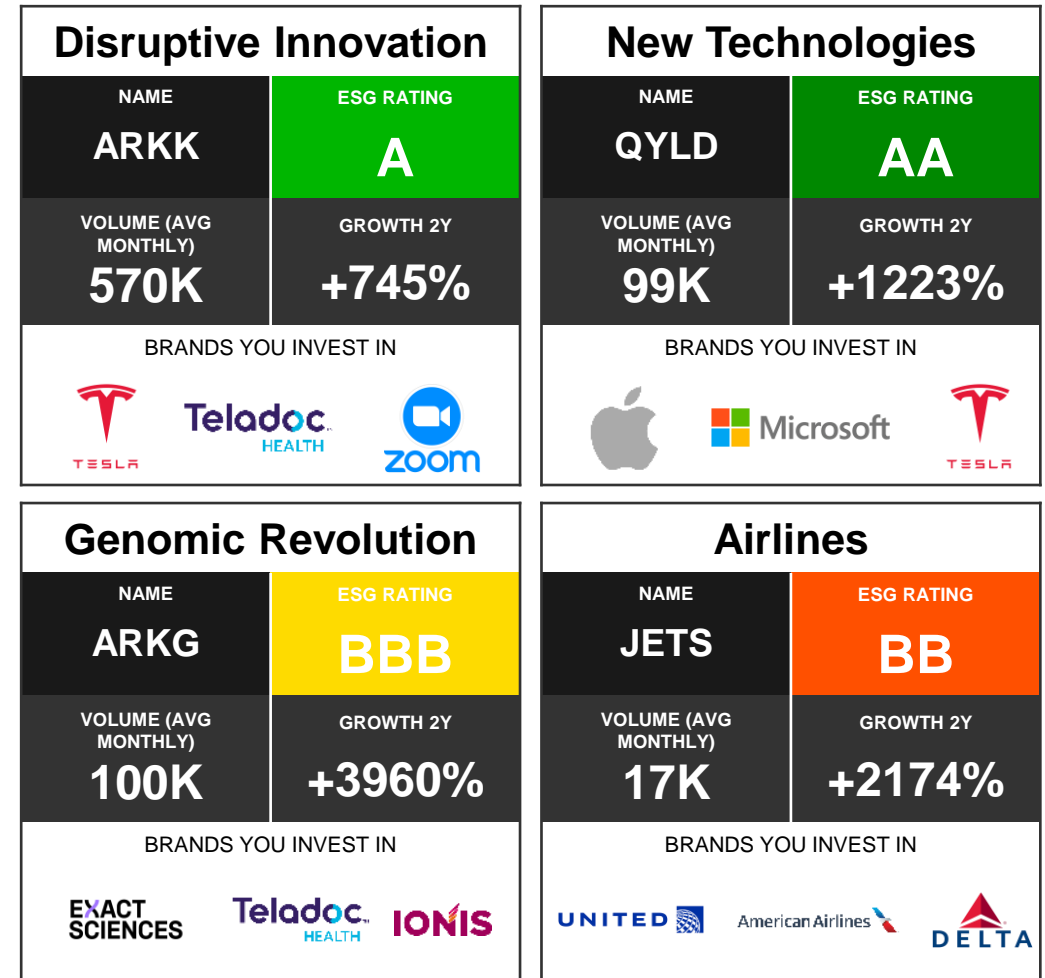
- 1 "Commerzbank share esg"
- 2 "MSCI"
- 3 "ESG investing"

MSCI 

- Measures the resiliency of portfolios to long-term risks and opportunities arising from ESG factors
- **Highly rated funds:** companies that tend to show strong and/or improving management of financially relevant ESG issues
- Range From best (AAA) to worst (CCC)

# Only one way, do your own due diligence

“ ETF – Exchange Traded Fund  
A financial asset that allows you to invest in a large number of shares at once around a given theme ”



## Only one way, do your own due diligence

“ ETF – Exchange Traded Fund  
A financial asset that allows you to invest in a large number of shares at once around a given theme ”

Carbon Market	
NAME <b>KRBN</b>	ESG RATING <b>AAA</b>
VOLUME (AVG MONTHLY) <b>4K</b>	GROWTH 2Y <b>+10 000%</b>
BRANDS YOU INVEST IN Carbon Credits	

“ Create a Marketplace solution to the problem of carbon ”



John Kerry

Consumers  
are still in  
the middle of  
their journey



---

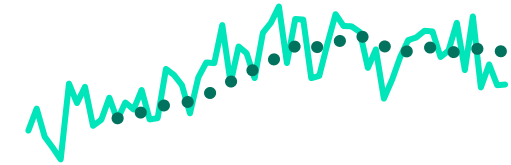
## IMPACT INVESTING

210K

+8% in 2 Years

---

Nonprofit membership  
organization building industry  
infrastructure and supporting  
**activities, education, and research**  
that help **accelerate the**  
**development of the impact**  
**investing industry.**



.. Moving average

---

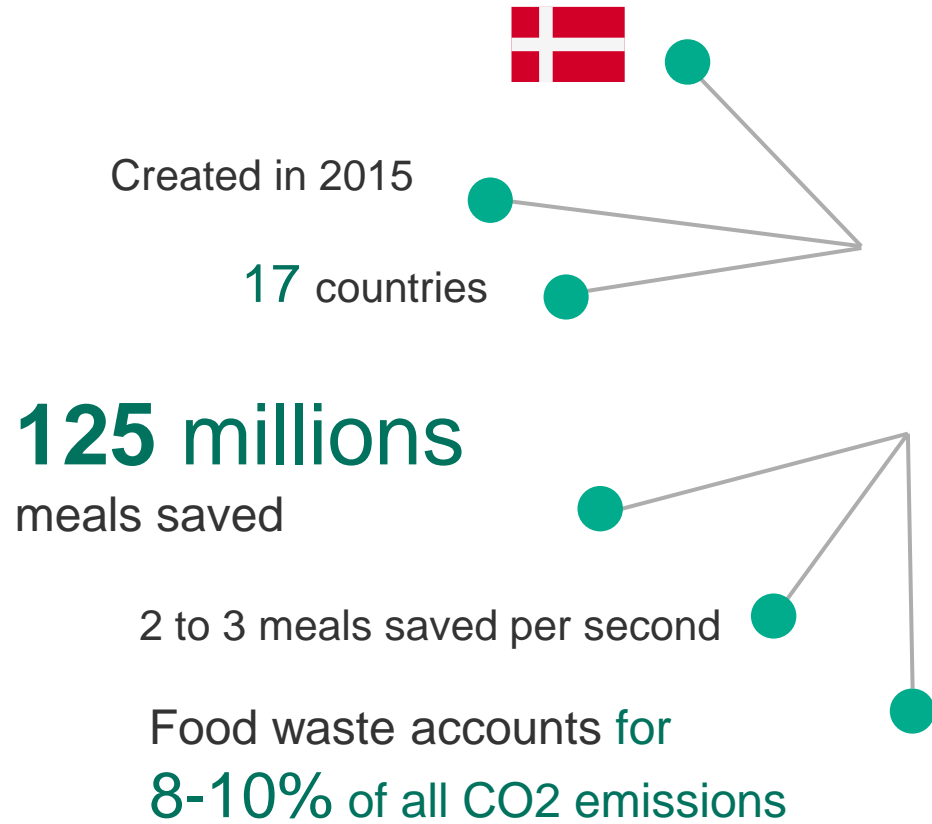
## GLOBAL IMPACT INVESTING NETWORK (GIIN)

10K

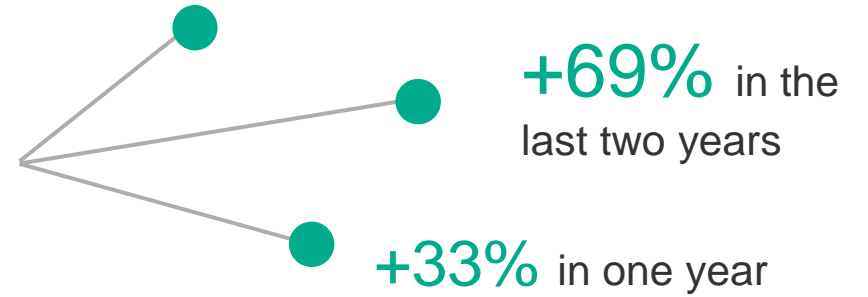
-12% in 2 Years

---

# And so consumers are looking for brands able to make a difference



**200K+** Monthly average searches



Key **associated brands**





# How can you access to the Sustainability trends data and insights?



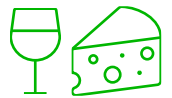
**Pierre Gomy**

Head of Marketing  
Central & Southern Europe  
Kantar Insights

# Sustainability trends Scope

## Scope

Available for **3 categories**



Food &  
Drinks



Retail



Commerce

Up to **100 topics** per category

Same topics across markets.

Global Analysis – Index for Market Specificities

5 years of historical information

**Data source**

Google Suite. Excludes China data.



# The Sustainability trends study helps you keeping the pulse



## Sustainability trends report

**35-40 Slides PPT** executive summary focusing on key Topics/ trends per category

**One page summary** of main insights

**3 500 €** per report for one category



## Bundle with Foundational Study

**8 000 €**  
(i.e 11% discount)



## Dashboard

Access to the **Power BI Dashboard** + **1 000 €**

**Updates** of the Dashboard (based on the same topics) – Monthly Updates:

**6 Months** period (6 Updates) **12 000 €** (Price per Update: 2K€)

**1 Year** period (12 Updates) **18 000 €** (Price per Update: 1.5K€)



## Focus on other market/category

Re-run of the analysis on a **local market**  
(based on the same topics)

**7 000 €**

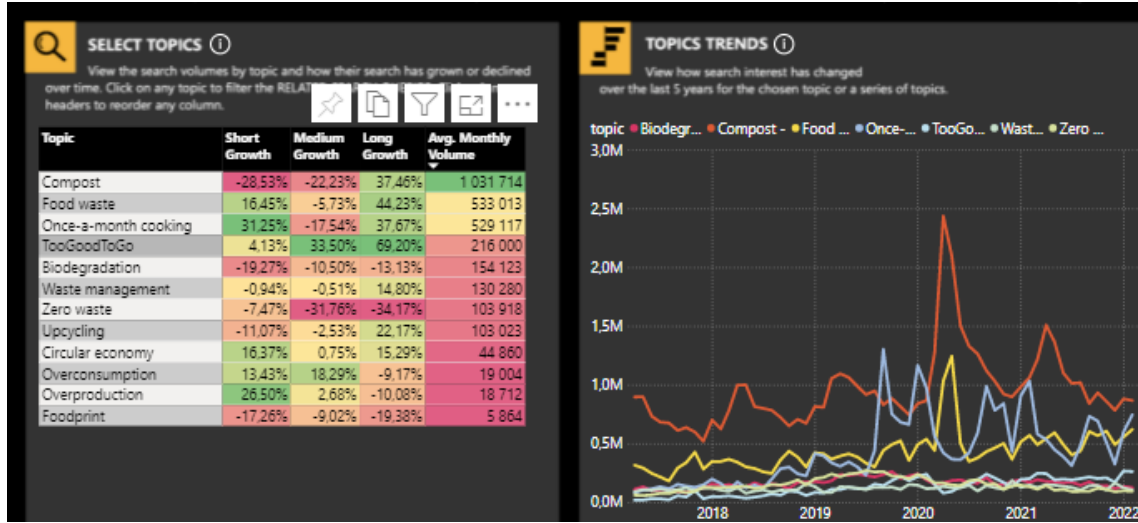
**Ad-hoc** analysis  
**From 10 000 €**

TBC based on the scope determined with the client

# Sustainability trends interactive dashboard



## Specific queries behind selected topics & Trends



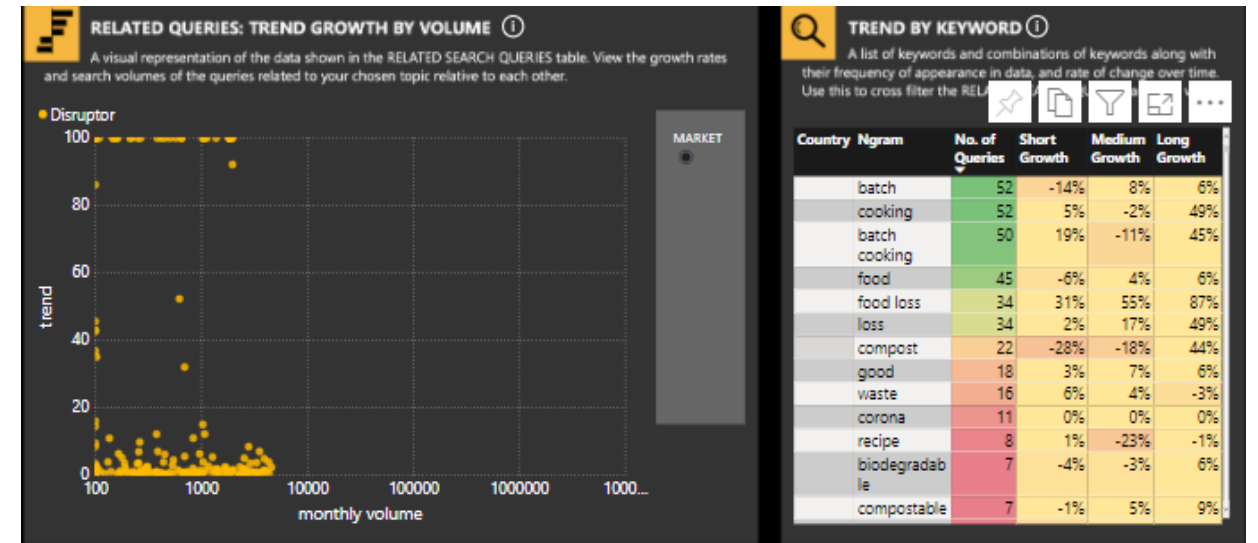
Global and local sustainability trends' momentum (velocity & crowd). Classified in mainstream, established, disruptors and niche.

## Country Index to compare markets



**RELATED QUERIES - GEOGRAPHIC INTEREST**

Country	4wk	3M	2Y
Afghanistan	0.1	0.3	0.1
Algeria	0.5	0.4	0.4
Angola	1.8	2.1	2.0
Argentina	11.4	11.7	14.9
Australia	21.7	25.0	20.0
Austria	9.2	10.7	12.5
Azerbaijan	12.0	14.5	22.5
Bangladesh	8.5	8.9	8.2
Belarus	0.8	0.8	1.3
Belgium	13.3	10.9	14.2
Benin	0.2	0.2	0.3
Bolivia, Plurinational State of	2.6	2.8	3.3
Brazil	13.9	12.2	16.1
Burkina Faso	0.2	0.2	0.2
Burundi	0.0	0.0	0.0
Cambodia	0.6	0.7	0.8
Cameroon	1.4	1.4	1.1
Canada	25.4	24.0	29.9
Chad	0.0	0.0	0.0
Chile	12.3	10.9	13.0



# Dive into a snapshot of the sustainability landscape in your category with Sustainability Sector Index

## FOOD



Fast food/casual restaurants



Foods and meals



Crisps and snacks



Meat products



Milk & Dairy products



Chocolate and sweets



Baby food and products

## SERVICES



Financial services, banking, and insurance



Travel services (e.g. hotels, airlines, holiday providers etc.)



Technology / social media companies (e.g. Google, Microsoft, Facebook etc)



Telecom service providers (fixed line, internet, mobile and/or Paid TV service)



Household services & utilities (e.g. internet, cable/ satellite, utilities like electricity/ water/gas etc.)



Online games

## BEVERAGES & TOBACCO



Non-alcoholic drinks (e.g. soft drinks, juices, waters etc.)



Beer and alcoholic beverages



Coffee and tea



Tobacco or manufactured cigarettes, vaping, electronic cigarettes (e-cigs)

## TECH & MOTOR



Mobile phones/ cell phones



Computers/ Laptops/ tablets



Appliances (e.g. TVs, refrigerators, vacuum cleaners, hairdryers, room heaters etc)



Motor vehicles and related products (e.g. cars, petrol/gas, motorbikes etc.)



Oil and gas (including petrol / diesel)

## FASHION



Luxury, products (e.g. Haute couture, luxury cars, boats, luxury jewellery, etc.)



Fashion



Clothing and shoes

## HEALTH & HYGIENE



Laundry detergents/ soaps/tablets



Cleaning products



Healthcare/ pharmaceutical products / Medicine or medical supplies



Personal care & cosmetics (e.g. make-up, toothpaste, moisturiser, soap etc.)

## RETAIL



Online shopping sites (e.g. Lazada, Shopee)



Supermarkets/ hypermarkets/ department stores



Retailers of electronics and electrical appliances (e.g. Dixons, Media Saturn etc.)

## LEISURE & LIFESTYLE



In-home entertainment (e.g. voice assistants, smart TVs, DVDs, video)



Furniture / home furnishing



Pet food

# The Sustainable Development Leads per country



THE NETHERLANDS

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**Corinne Mostaert**

[corinne.mostaert@kantar.com](mailto:corinne.mostaert@kantar.com)

# Coming Next

April  
2022

Sustainability  
trends –  
Food & beverages  
webinar

Food 360  
Syndicated Study  
& Webinar

May  
2022

Sustainability  
trends –  
Retail  
webinar

e-Commerce On  
Syndicated Study  
& webinar (May 25<sup>th</sup>)

June  
2022

Sustainability  
trends –  
Finance  
webinar

SoFia  
Syndicated Study  
& webinar

September  
2022

Sustainability Sector  
Index  
Syndicated study  
Wave 2 & webinar

Please contact [marina.cozzika@kantar.com](mailto:marina.cozzika@kantar.com) if you are interested