



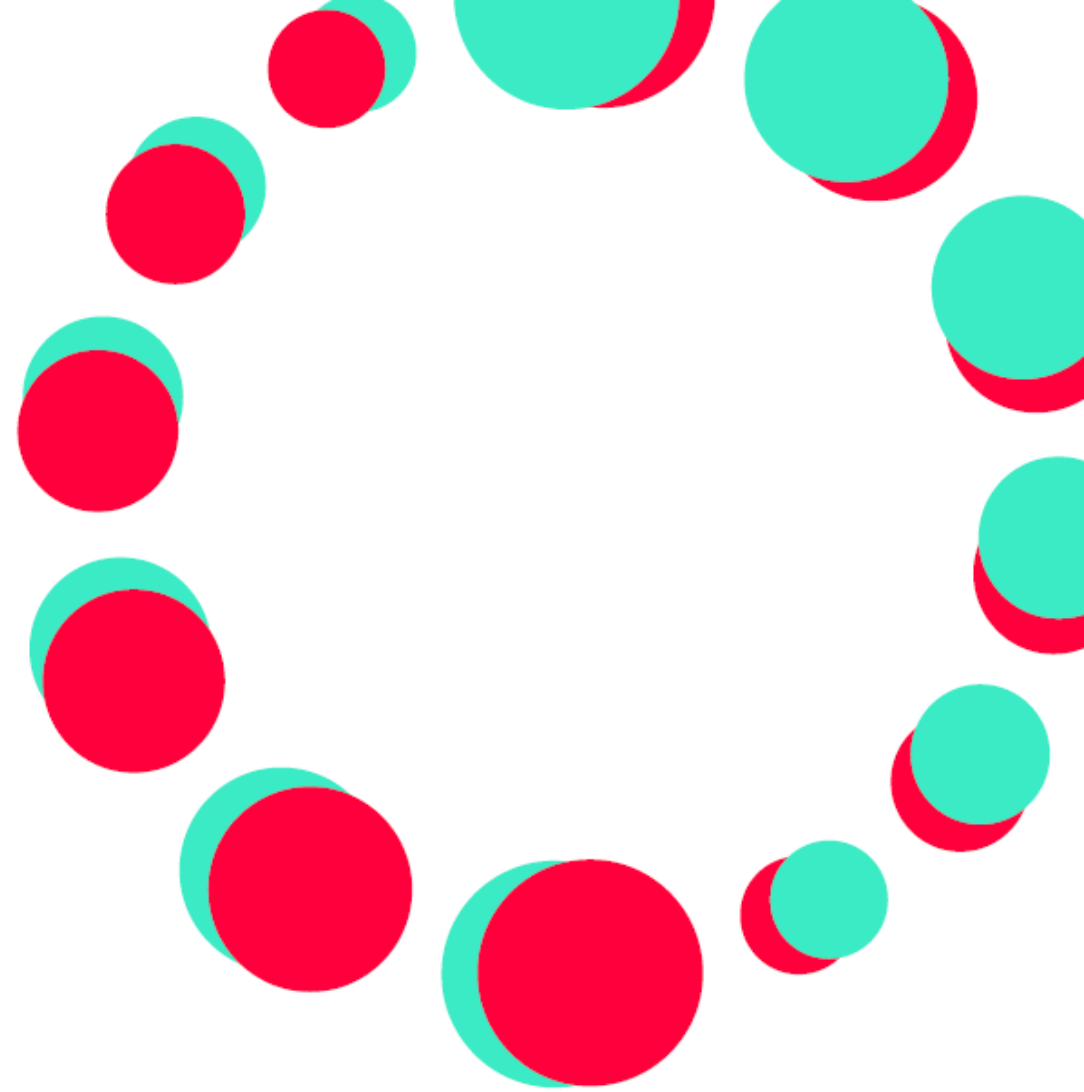
Sustainable *marketing 2030.*

“A sustainable growth framework for marketing”

Deep-dive report: Sweden

May 2023

Sveriges
Annonörer **KANTAR**



Agenda

- **Introducing this report**
- **An overview of the global results**
- **Sweden 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



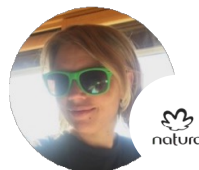
Mark van Iterson



Preeti Srivastav



John Schoolcraft



Charmian Love



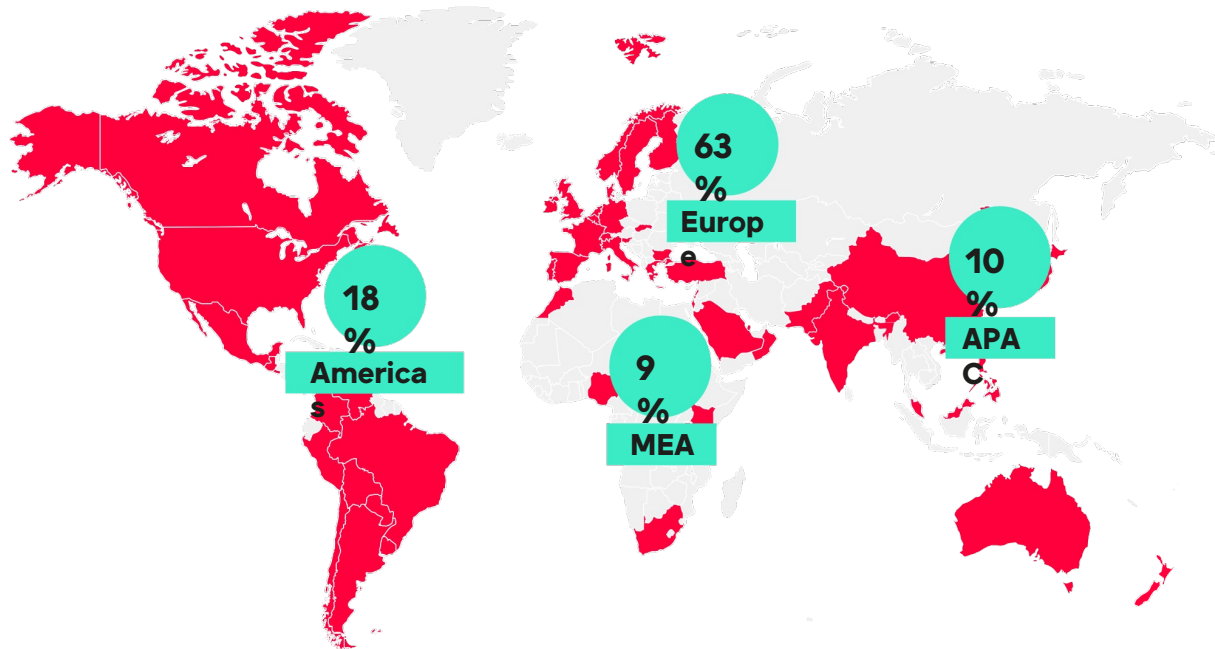
Our global community.



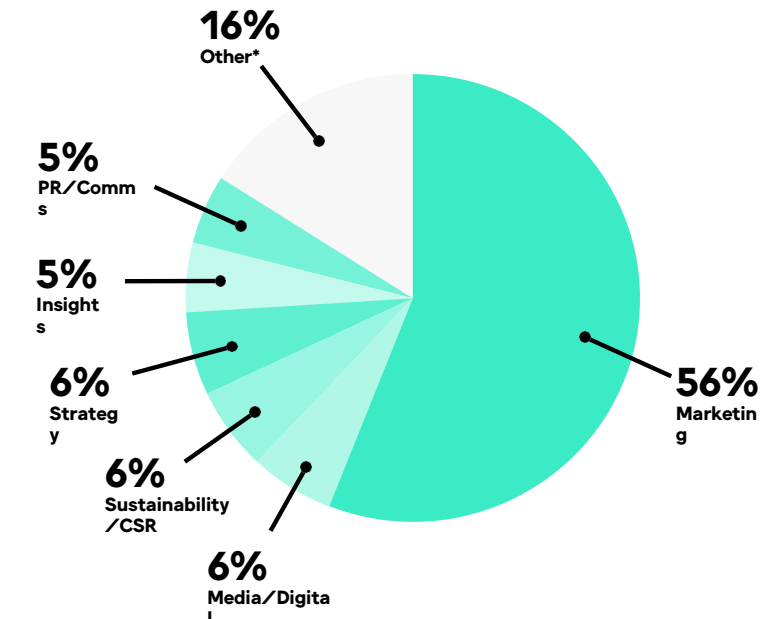
**Who did we
interview?**

Global quantitative sample.

Respondent split across the



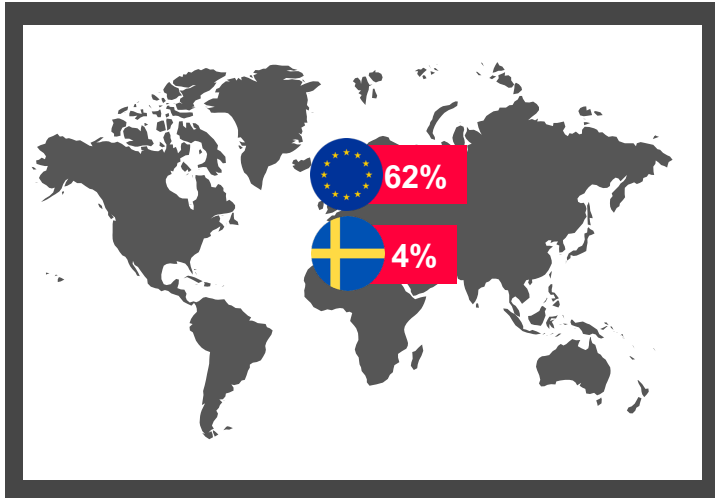
Respondent split across functions.



*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

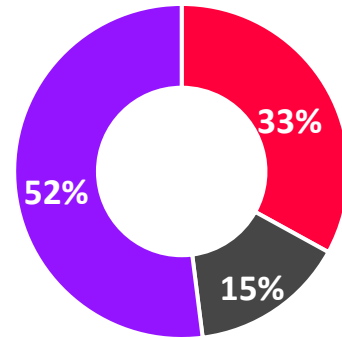
Who did we interview?

Sample profile (at company level)



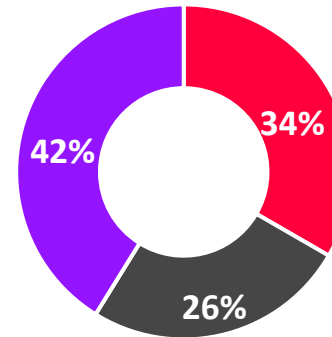
Calculated out of total sample

Business Focus



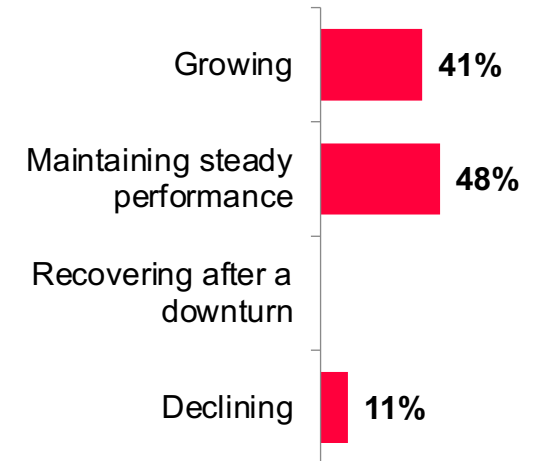
- Business to Consumer (B2C)
- Business to Business (B2B)
- Both

Company size (by no. of employees)

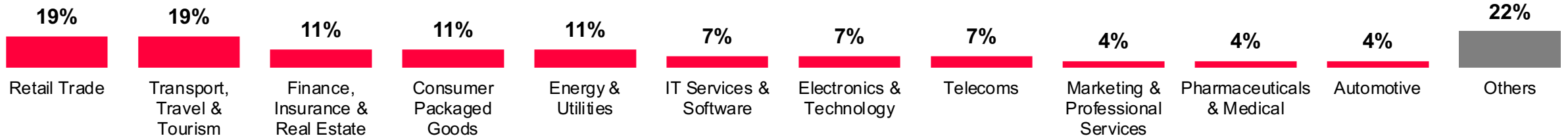


- Small (< 1000 empl.)
- Medium (1000-5,000 empl.)
- Large (> 5,000 empl.)

Current business performance



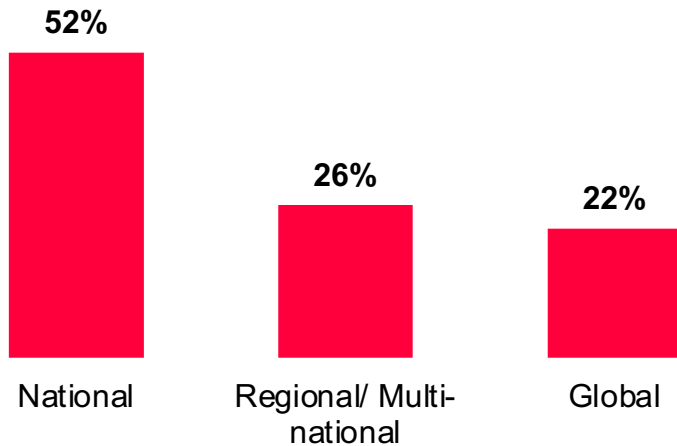
Company sector



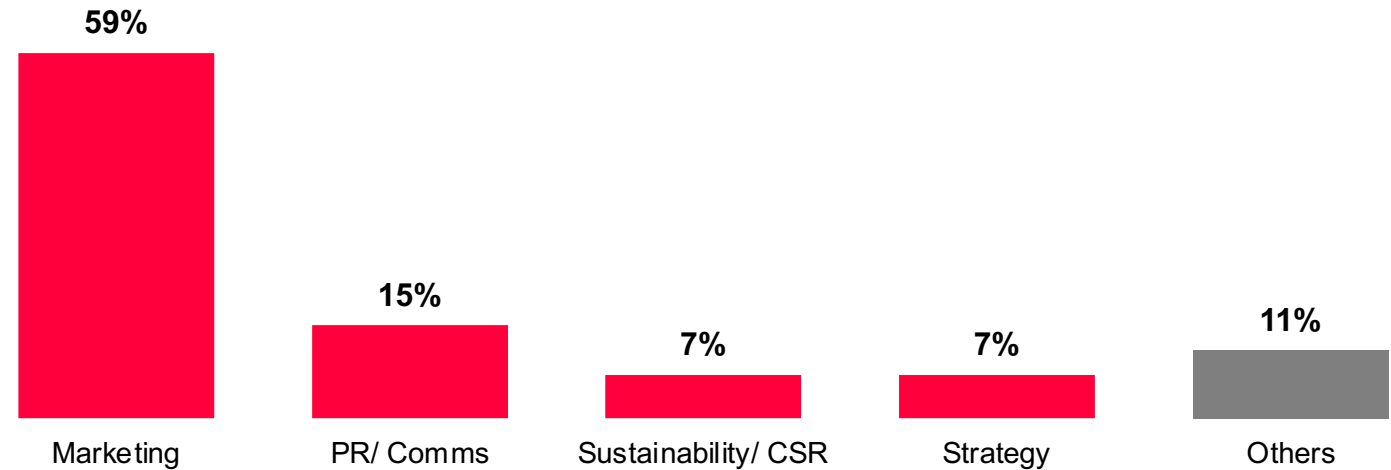
Who did we interview?

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:

- Country deep-dive (🇸🇪)
- Europe norm (🇪🇺)
- Global norm (🌍)



How are the differences highlighted?

Where the results in Sweden 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 Sweden (at Confidence interval 95%)*

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...

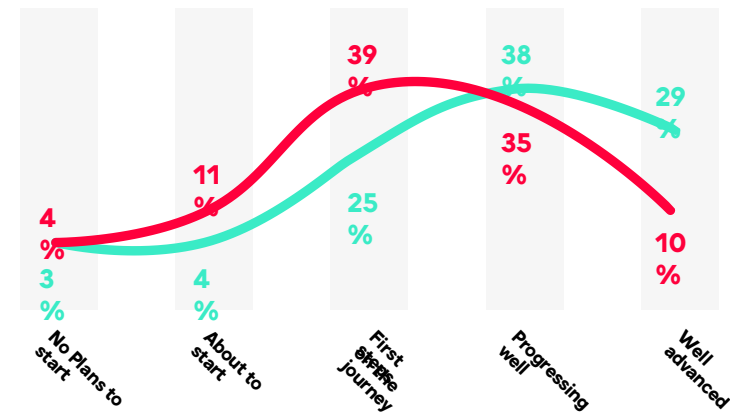
90%

of marketers agreeing that sustainability agendas must be more ambitious

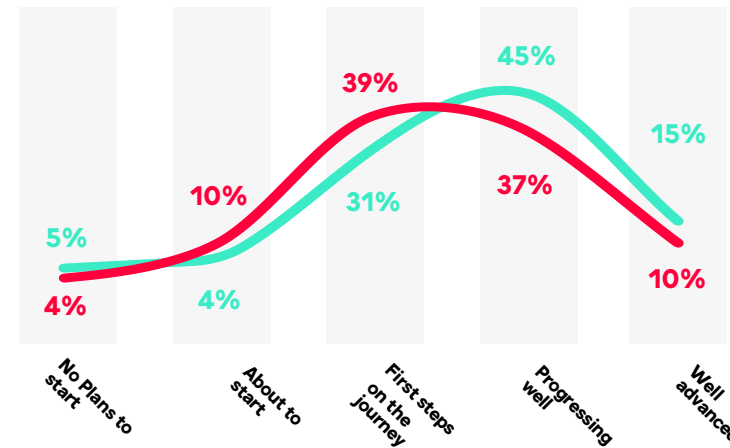
94%

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



KANTAR

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, Program 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

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



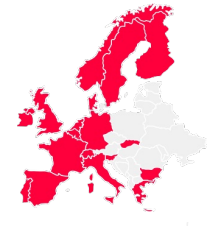
LATAM.

Challenges on conflicting business priorities and building internal confidence



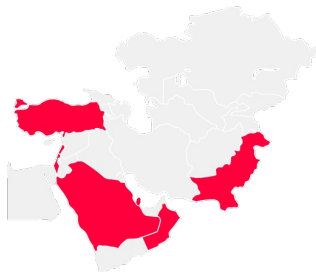
Europe.

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



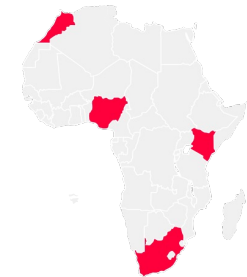
Middle East.

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.



“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

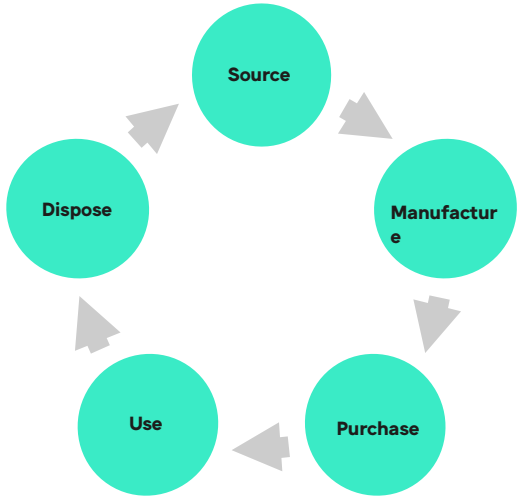
From.

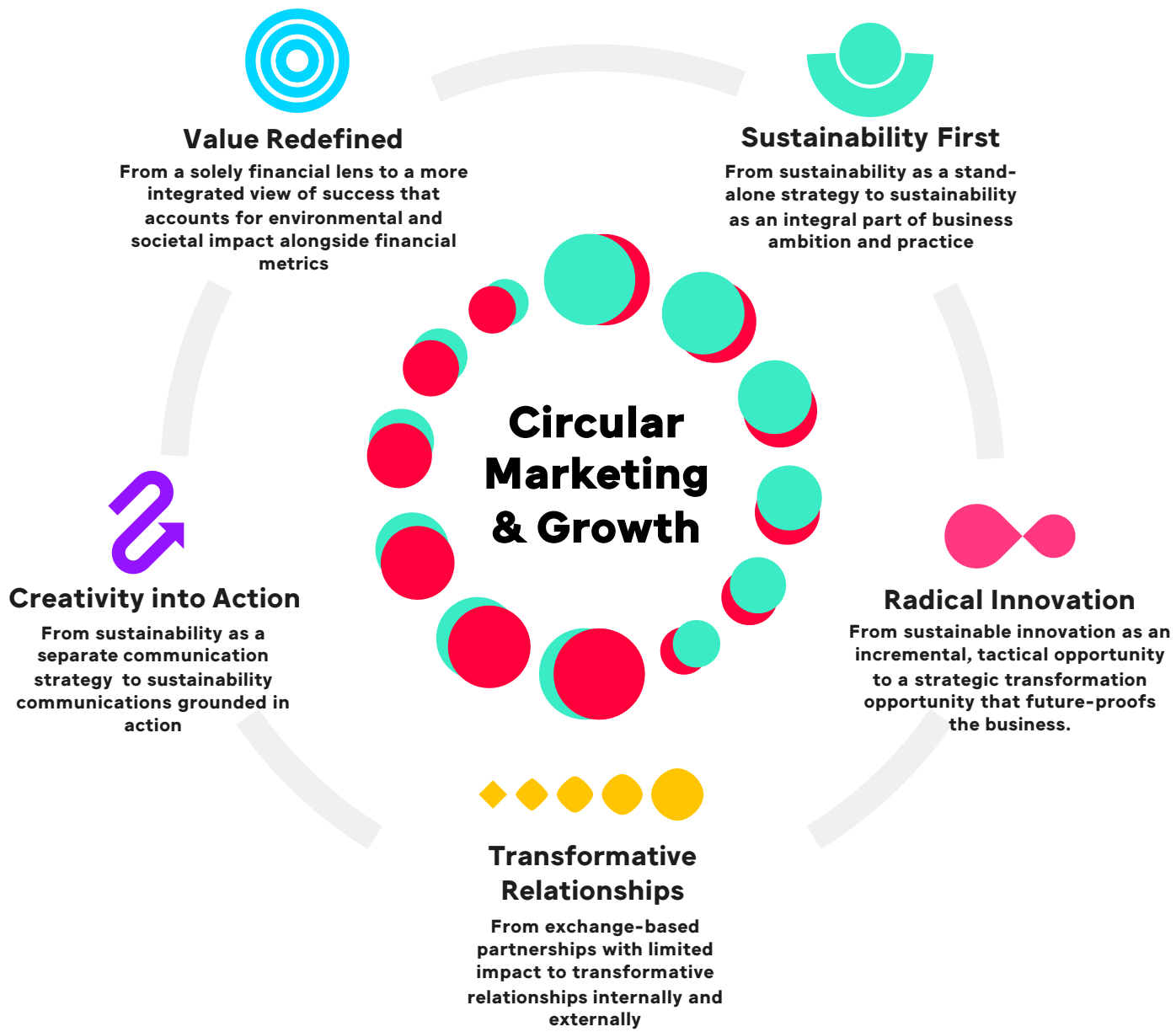
Marketing’s scope centred in purchase and use, within a linear value chain.



To.

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







Sweden 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 Swedish marketers, aligned 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



97%



97%



98%

*% Saying Yes

What would you add, remove?
(Open answers)

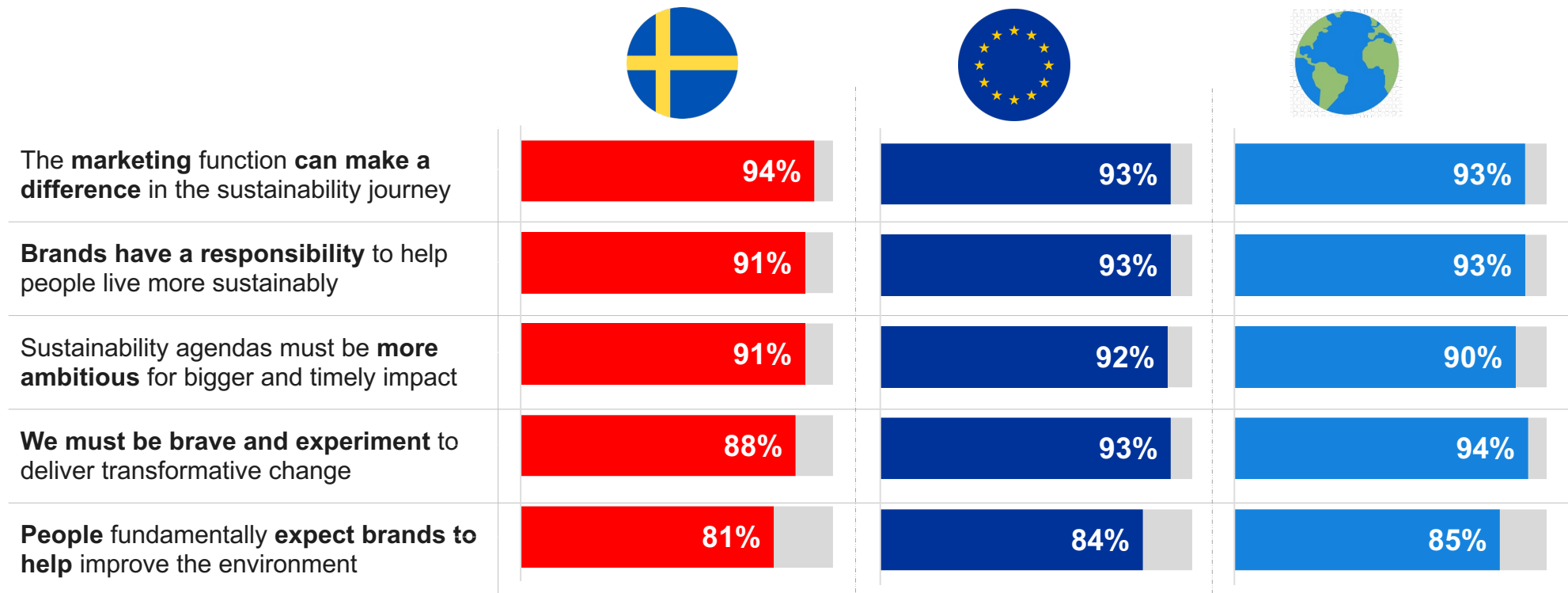


In Swedish marketers' words...

"Economic progress is not a prerequisite for a good life for all humanity on this planet, which the definition suggests." (PR/Comms, Regional role)

The role of marketing in the sustainability journey

Swedish marketers share the belief with their global peers that **brands should be responsible**, and that **marketing function can make a difference** in the sustainability journey. They also show strong belief that sustainability agendas must be **more ambitious** for bigger and timely impact.



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

B1. Thinking generally about marketing and sustainability, to what extent do you agree with the following? (5 points scale, 1=Strongly agree/ 5 =Strongly disagree)

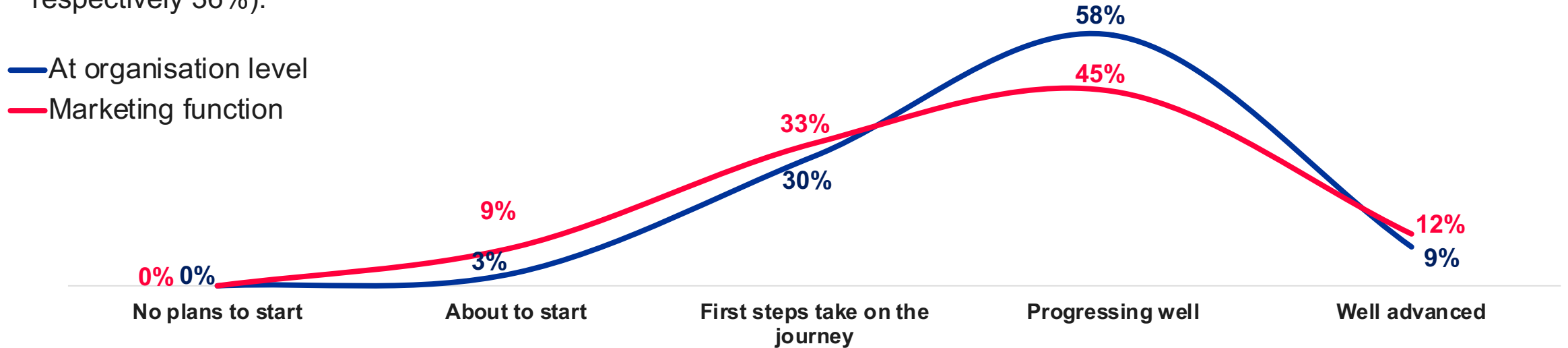
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
Global Base: 938 | Europe Base: 577 | Sweden Base: 33 respondents

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

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 Sweden. Worth mentioning that, based on our interviews, 45% of the client-side marketers in Sweden are indicating they are 'progressing well', directionally higher than the regional and global benchmarks, at marketing function level (37% respectively 36%).



Benchmarks	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 | Sweden Base: 33 respondents

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



88% taking action towards the UN's SDGs

Around 9 in 10 client-side marketers are taking actions related to the [UN Sustainable Development Goals \(SDGs\)](#). 2 in 3 marketers in Sweden indicate that the SDGs are fully embedded in their strategy, significantly higher than their counterparts in Europe or the rest of the world.



88%



77%



74%

Taking action:

	Sweden	Europe	Rest of the World
We have the relevant goals fully embedded into our strategy	64%	39% ↓	36% ↓
My company is taking some actions towards the goals	24%	38%	38%
My company is aware of the SDGs but isn't taking any committed action towards the goals	6%	8%	10%
My company is unaware of the SDGs	0%	6%	8%
Don't know	6%	9%	8%

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 | Sweden Base: 33 respondents

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Gap analysis – How to read



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



Marketing and Sustainability – Sweden focus

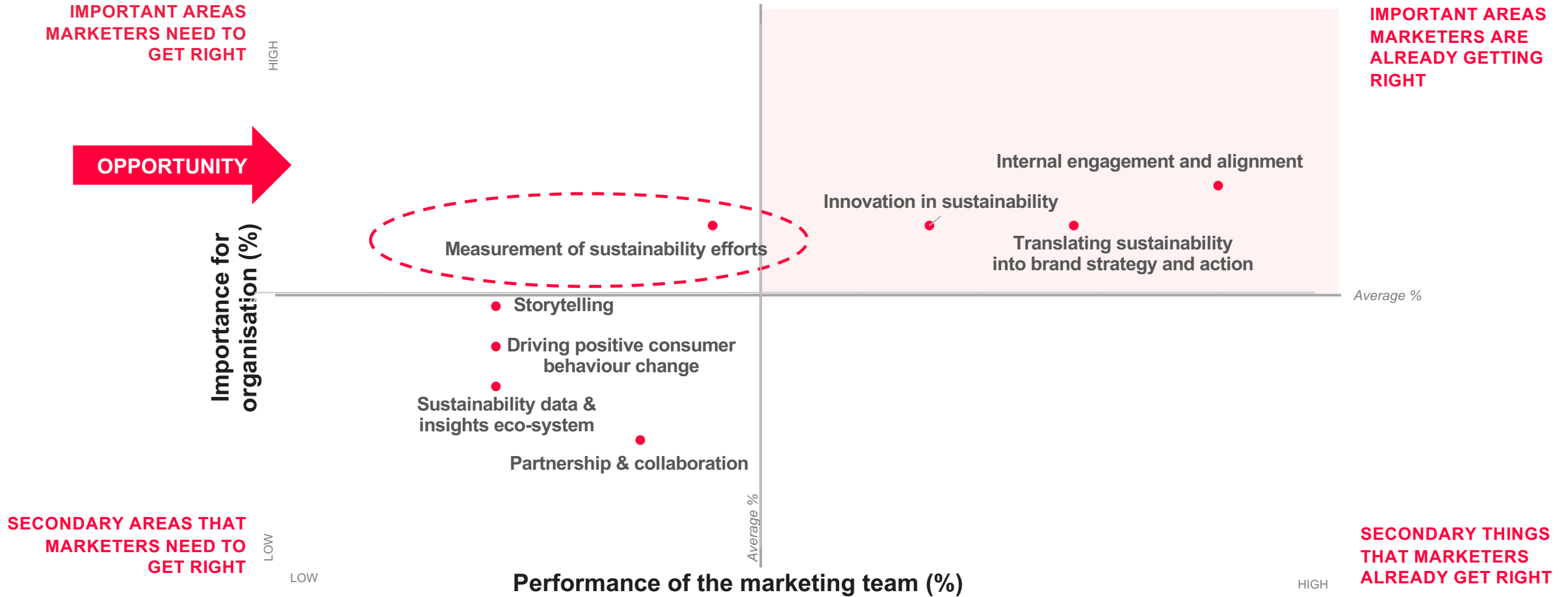


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)



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
 Sweden Base: 33 respondents



Marketing and Sustainability – EUROPE

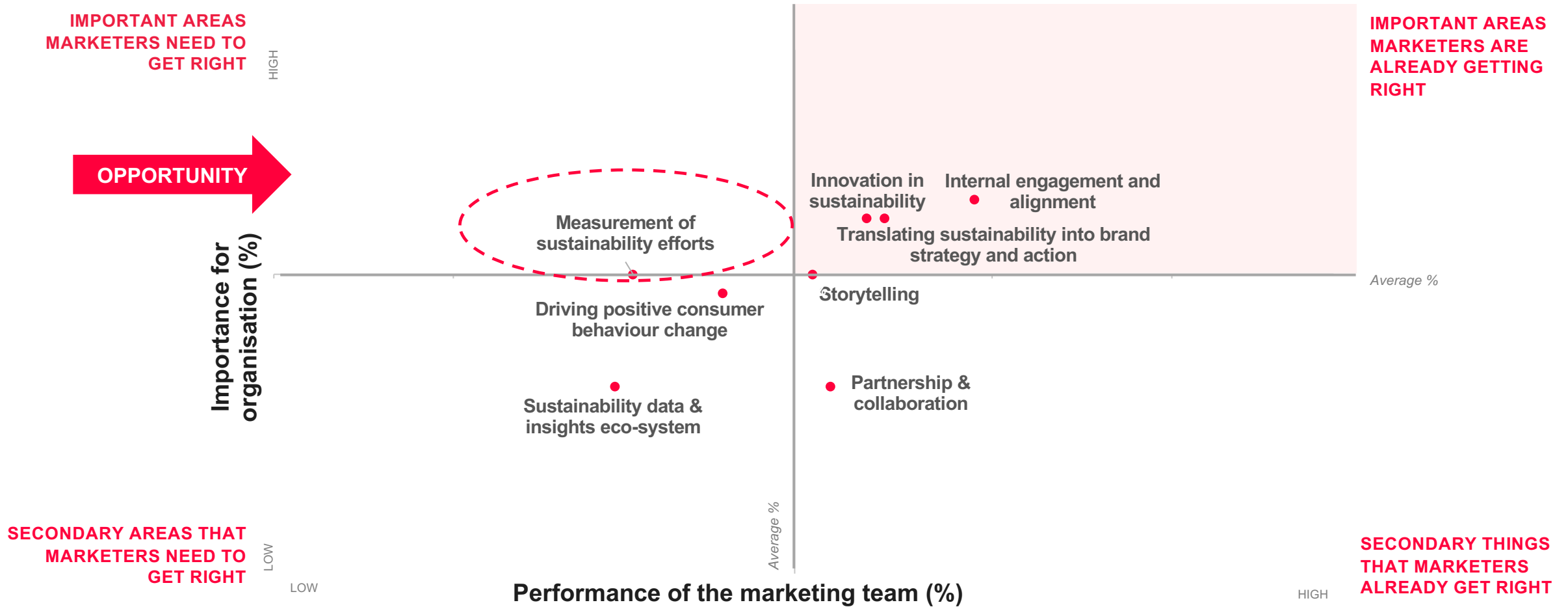


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

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)

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

Europe Base: 577 respondents



Marketing and Sustainability – GLOBAL

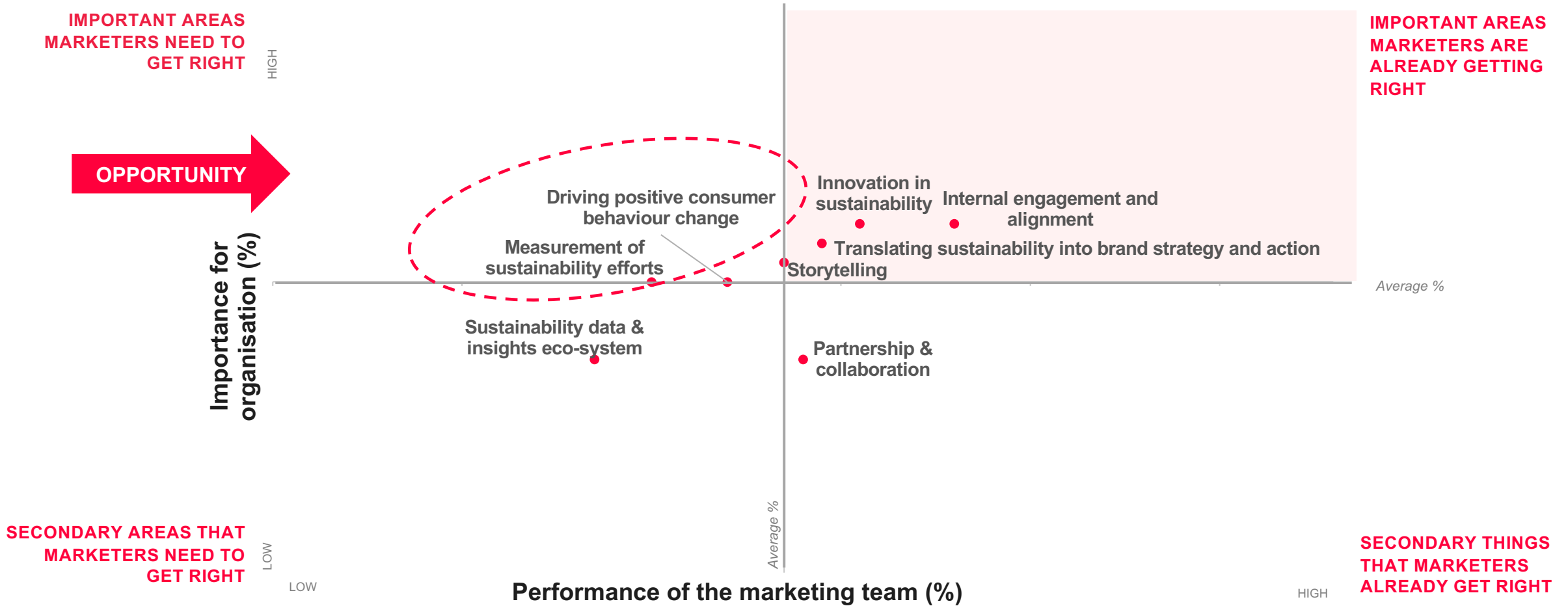


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

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)

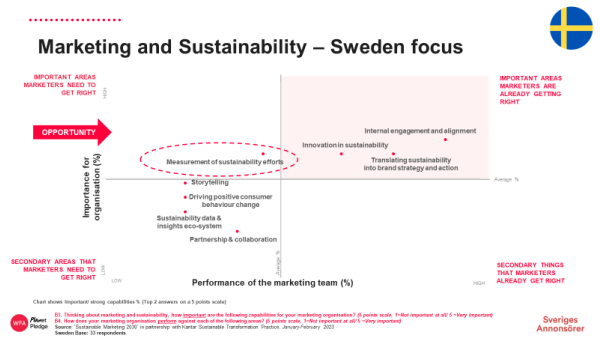
B4. How does your marketing organisation perform against each of the following areas? (5 points scale, 1=Not important at all/ 5=Very important)

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

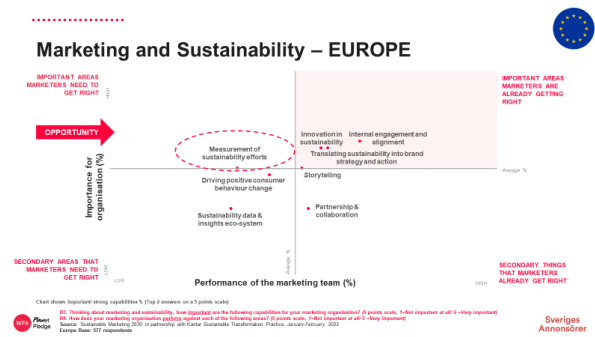
Global Base: 938 respondents

Gap analysis – Key learnings for Sweden

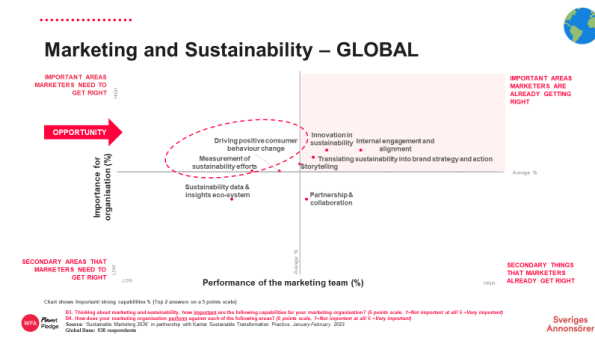
Market & Business initiatives – Sweden –



Market & Business initiatives – Europe benchmark –



Market & Business initiatives – Global benchmark –



Where does Sweden stand versus regional and global norms?

Senior marketers in Sweden are confident on the **internal engagement, innovation and translating sustainability into brand strategy and action** – important aspects on which their organisations perform above average today.

Measuring sustainability efforts represents main opportunity for marketers in Sweden (and globally).

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)

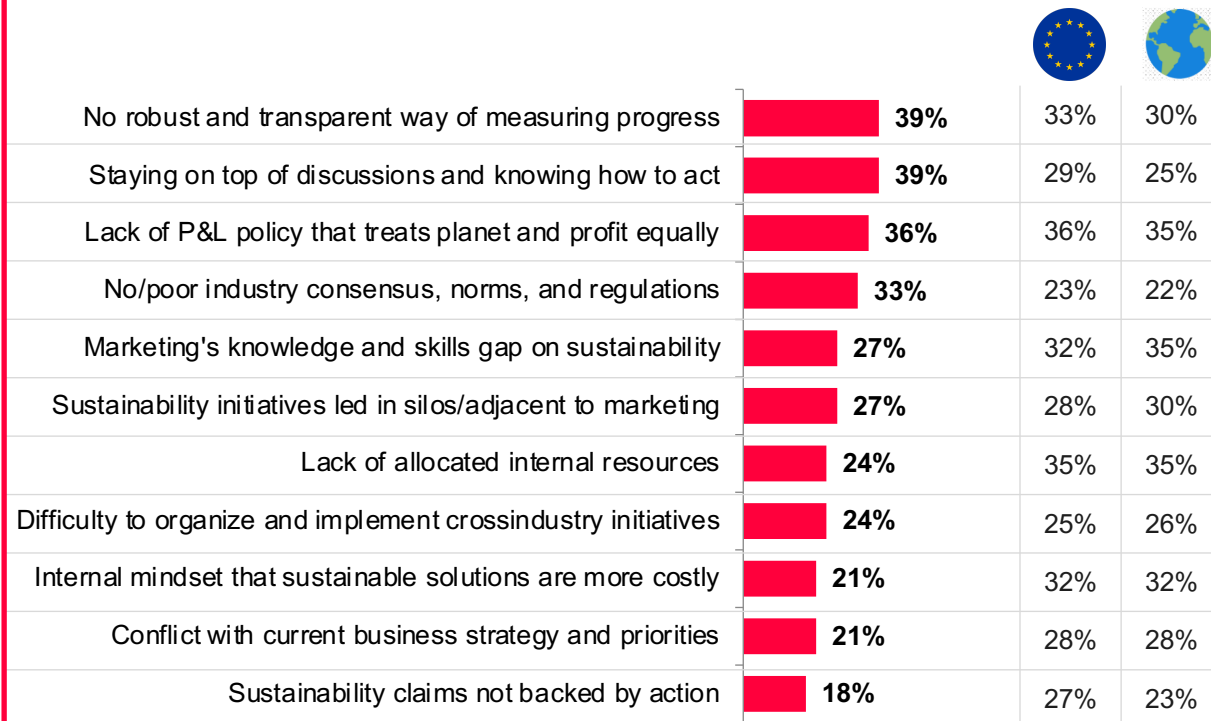
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Global Base: 938 | Europe Base: 577 | Sweden Base: 33 respondents

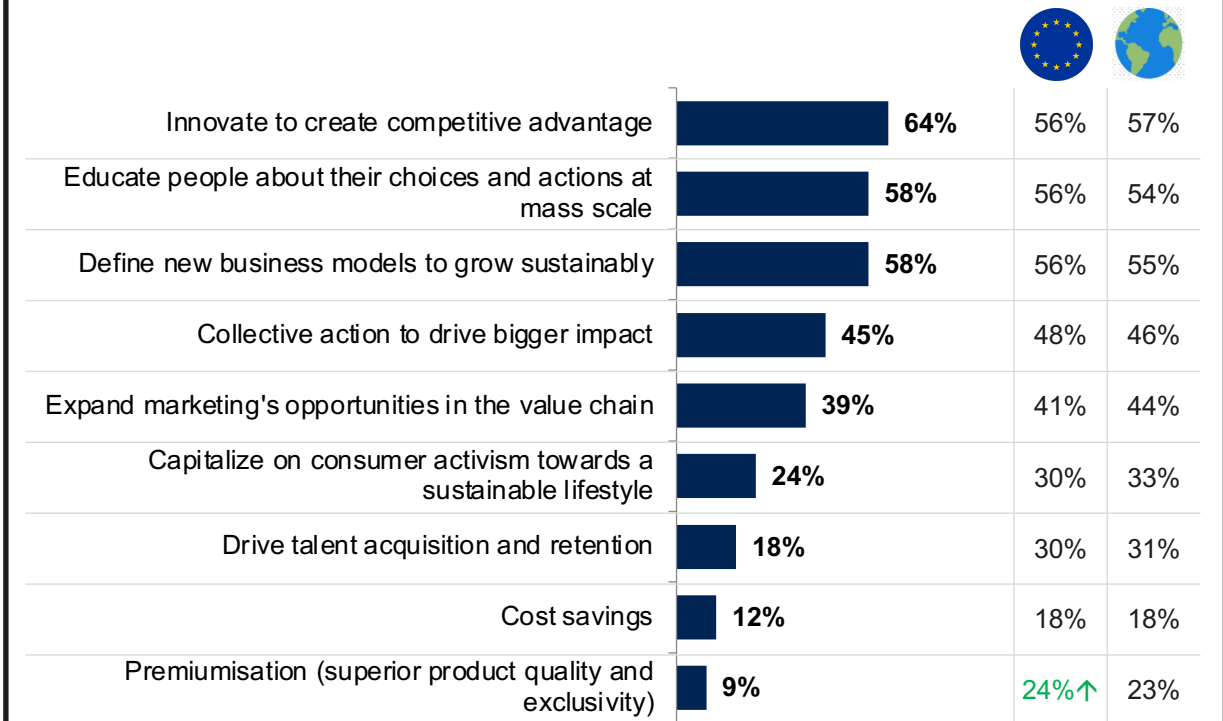
Challenges and Opportunities

Senior marketers indicate diverse challenges in the sustainability space, with **lack of robust and transparent way of measuring** and **knowing how to act** being on top. A directionally higher score for **poor industry consensus** as seen in Europe or worldwide. When it comes to opportunities, **innovation, consumer education** and **defining new business models** stand out – in Sweden and globally alike.

Main challenges in progressing sustainability ambitions



Main opportunities for marketing organisation



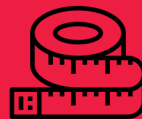
3. Sustainability performance across marketing levers



Strategy &
Portfolio



Innovation



Measurement



Communication

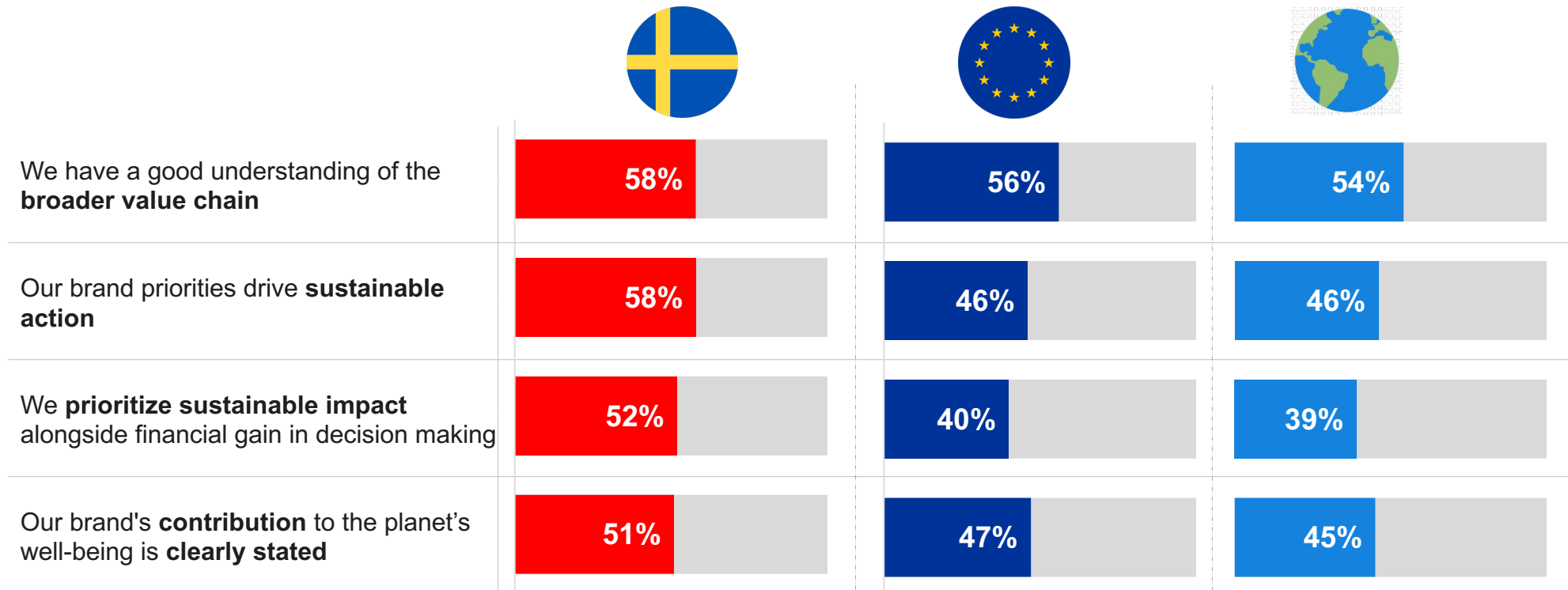


Partnership &
Collaboration

58% claim a good understanding of the broader value chain



Close to 3 in 5 Swedish marketers claim they progress well in owning a **good understanding** of the broader value chain, in line with the European and global benchmarks. More than half think that their brand **drives sustainable action** and **sustainable impact is prioritized** alongside financial gain in decision making.



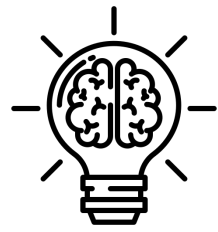
*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

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)

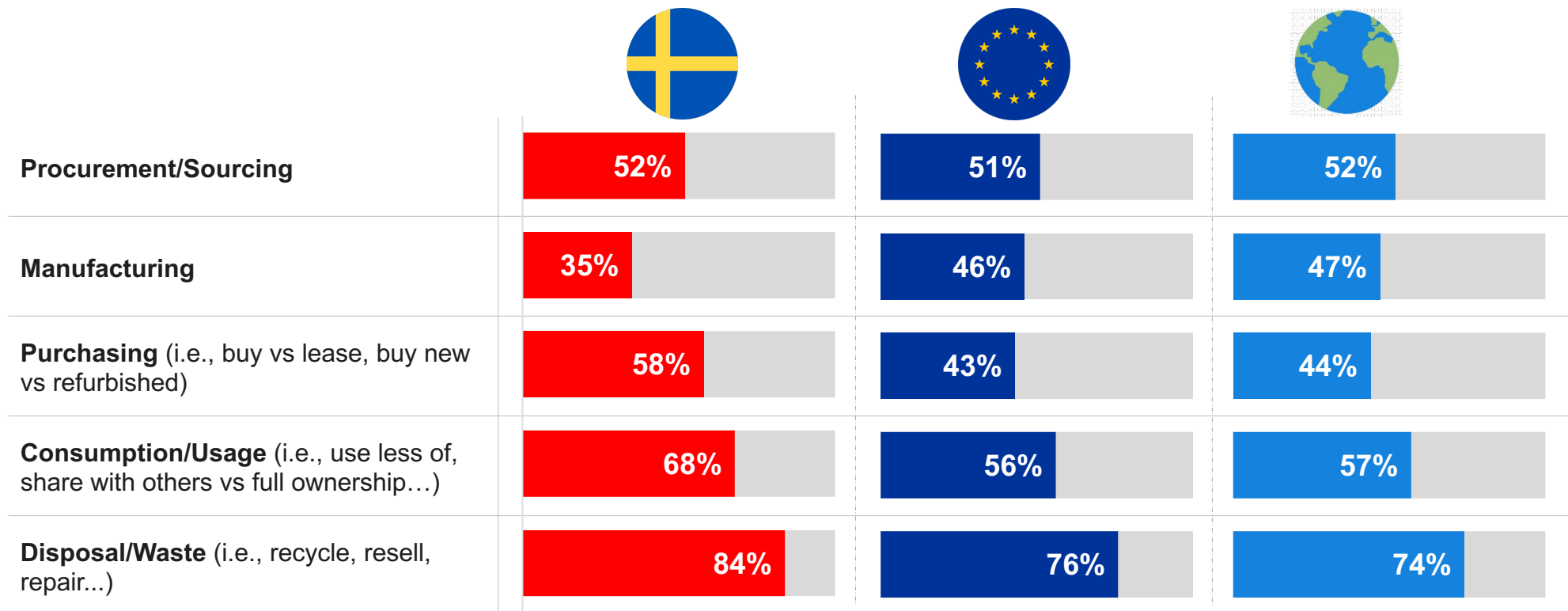
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
Global Base: 938 | Europe Base: 577 | Sweden Base: 33 respondents

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

84% 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**. There is an indicative higher tendency to focus also on other aspects, such as **purchasing, consumption/usage** and **procurement processes** as compared to Europe or worldwide.



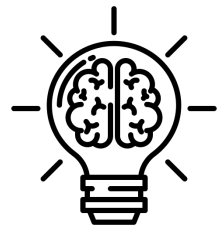
*% saying Yes

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



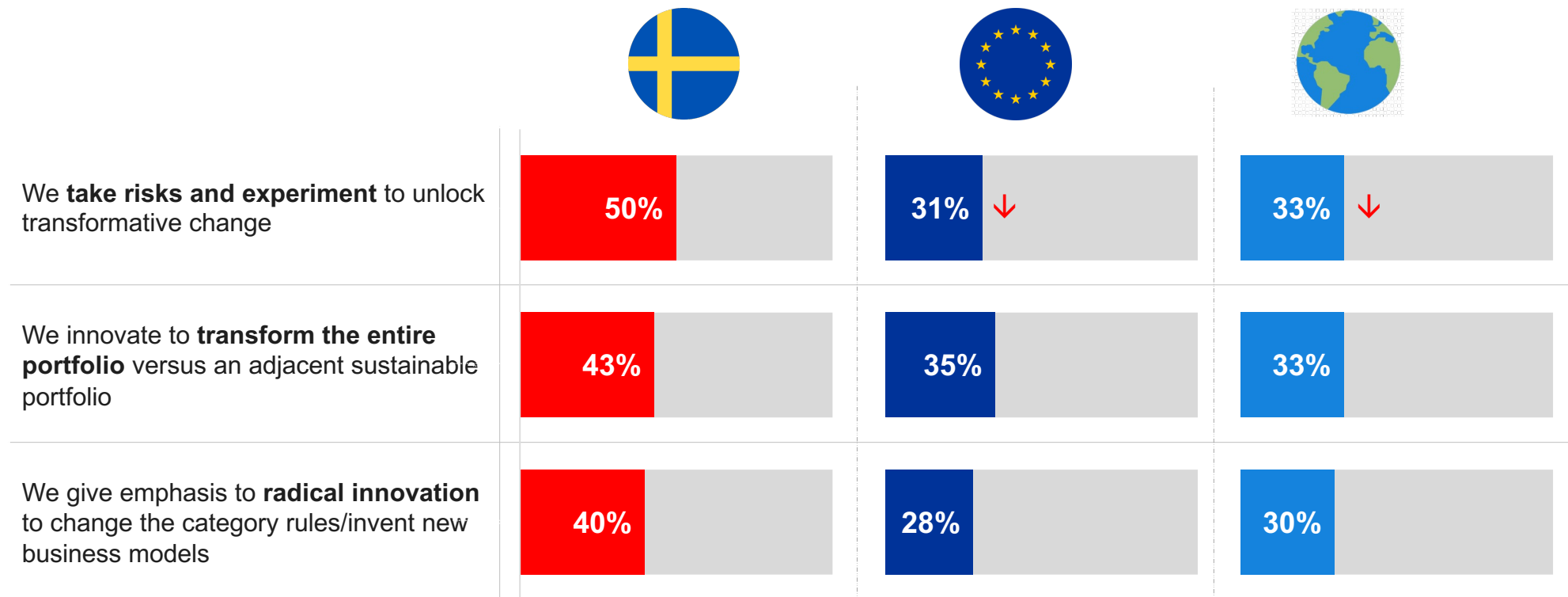
C3. Which of the following do you focus your sustainable innovation efforts on? *Single answer*
 Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
 Global Base: 938 | Europe Base: 577 | Sweden Base: 33 respondents

Sveriges Annonörer



1 in 2 claim a good progress on sustainability innovation

Half of the interviewed Swedish marketers are confident on their progress in **taking risks and experiment** to unlock transformative change – a tendency significantly higher than the European or global trend.



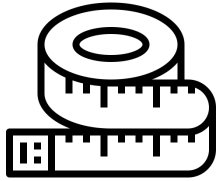
*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

C2. How far along is your marketing organisation in the sustainability journey in terms of Innovation? (5 points scale, 1=No plans/ 5=Well advanced)

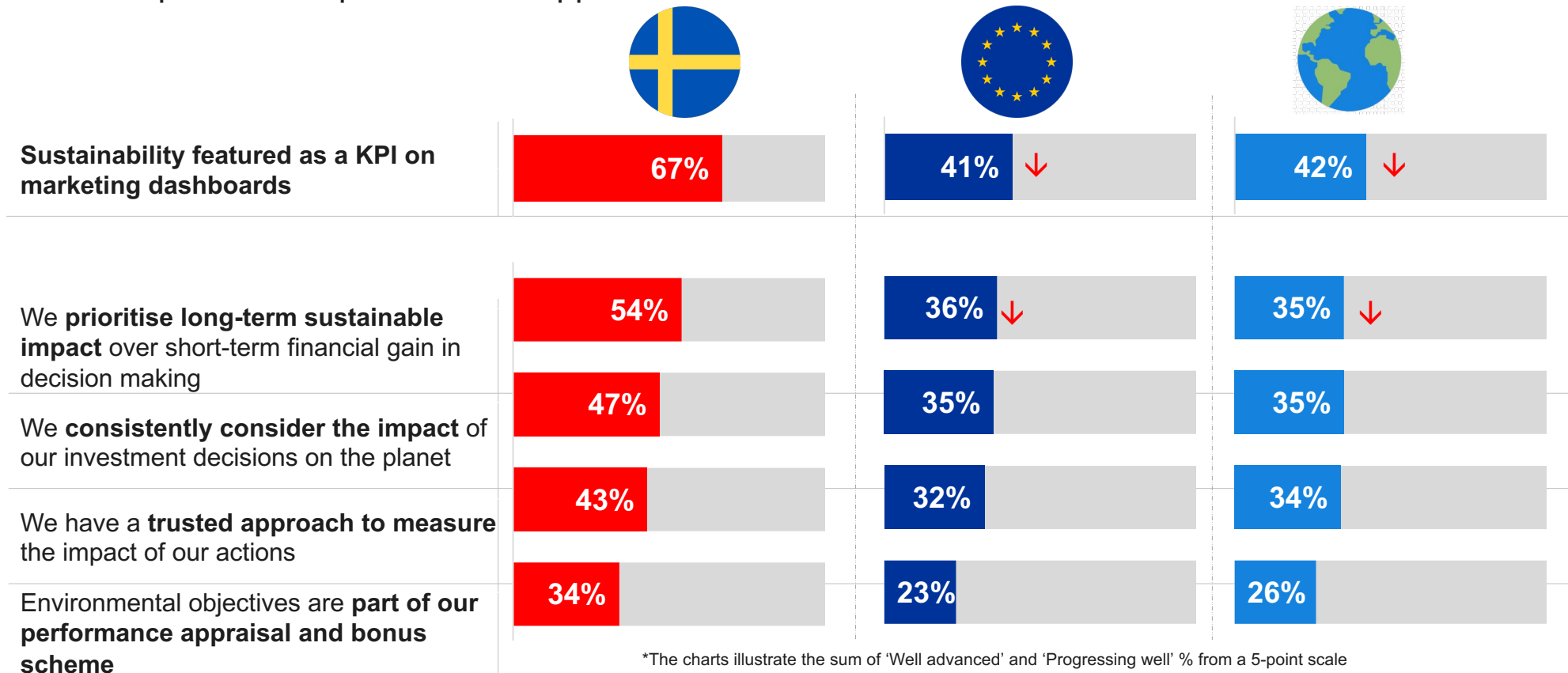
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
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↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

67% stated that sustainability is set as a marketing KPI



Furthermore, 2 in 3 Swedish marketers have stated that **sustainability is set as a KPI on the marketing dashboard**, significantly higher than the noted trends in Europe and globally. Majority feel their organisation is progressing well in prioritizing **long-term sustainable impact** over short-term financial gain and one third confirmed that **environmental objectives** are part of their performance appraisal and bonus scheme.



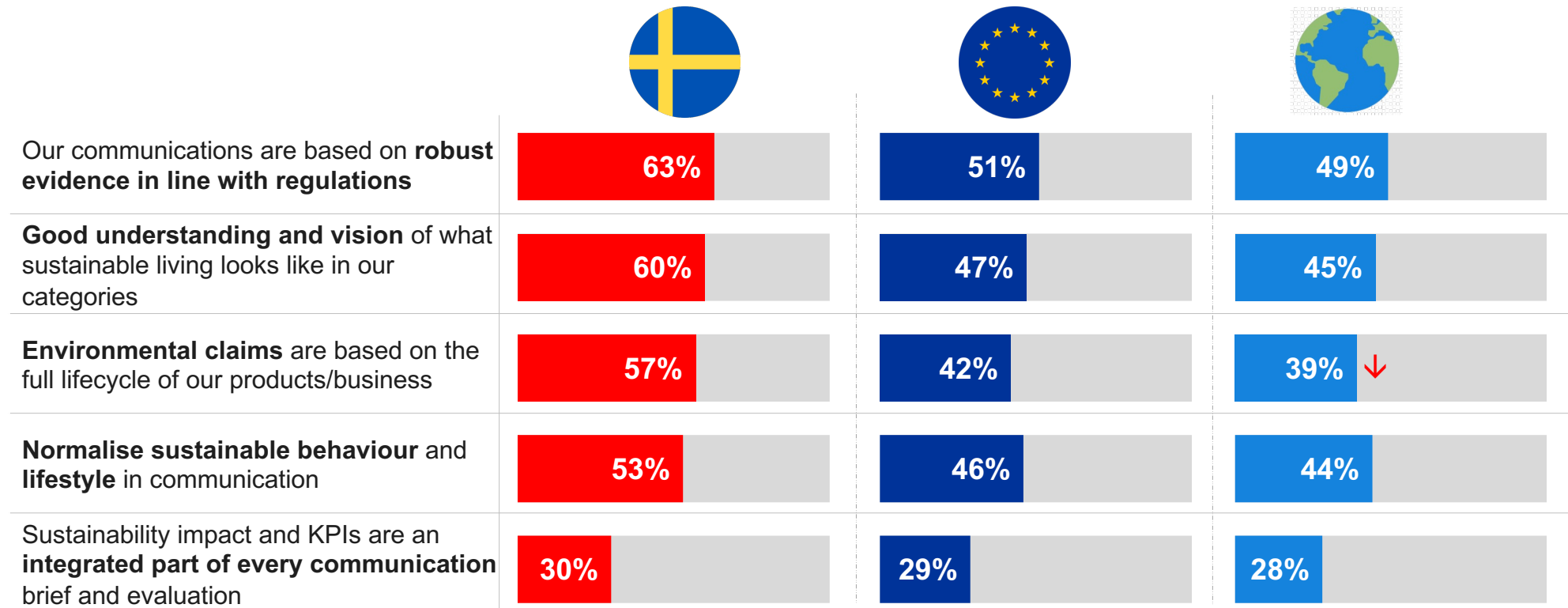
C6. Does sustainability feature as a KPI on your marketing dashboard? *Single answer* C7. How far along is your marketing organisation in the sustainability journey in terms of Measurement? (5 points scale, 1=No plans/ 5=Well advanced)
 Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
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↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

Sweden reports a better Comms progress than global trends



Generally, the interviewed marketers in Sweden claim to be confident on their organisations progress in terms of comms, more so than their counterparts from Europe or worldwide. Around 2 in 3 marketers think that their communications are based on **robust evidence in line with regulations** and that they have a **good understanding** of what sustainable living looks like.



*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 | Sweden Base: 33 respondents

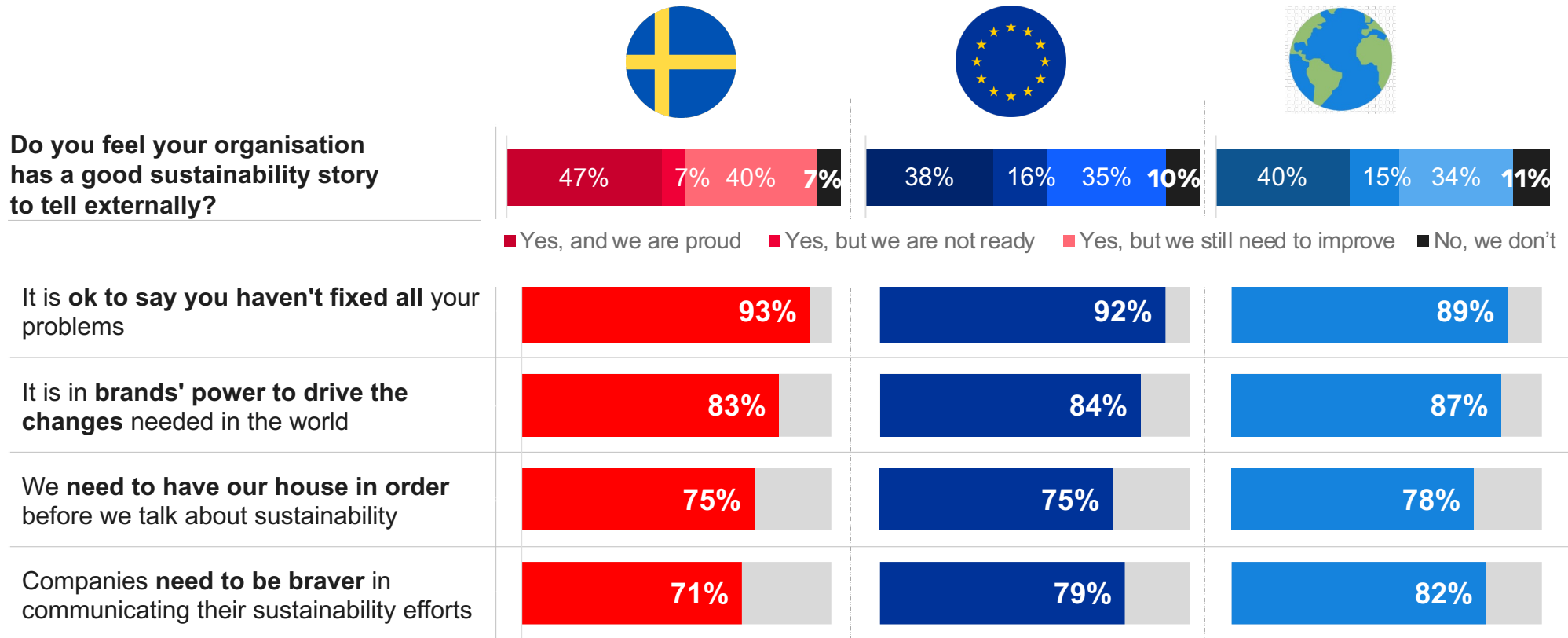
↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level



Communication around sustainability



Close to 1 in 2 Swedish marketers are **proud to tell their sustainability story** today, directionally higher than their regional and global peers. Most agree that it is in **brands' power to drive the changes** needed in the world, in line with most other markets.



*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

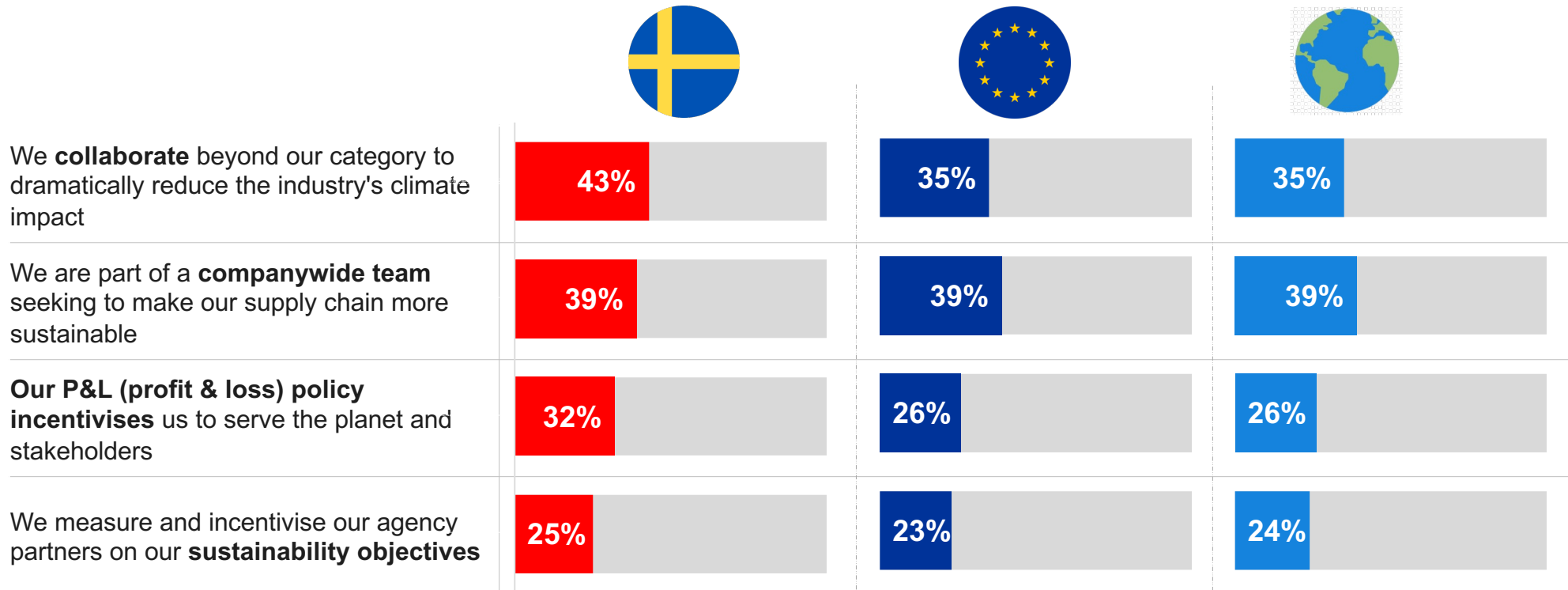
Global Base: 938 | Europe Base: 577 | Sweden Base: 33 respondents

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

25% measure and incentivise their agency partners



Indicatively **higher proportion** of Swedish marketers stated that they **collaborate** beyond their category to dramatically reduce the industry's climate impact as compared with European and worldwide benchmarks. One quarter **measure and incentivise their agency partners** on the sustainability objectives, fully aligned with European and worldwide benchmarks.



*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)

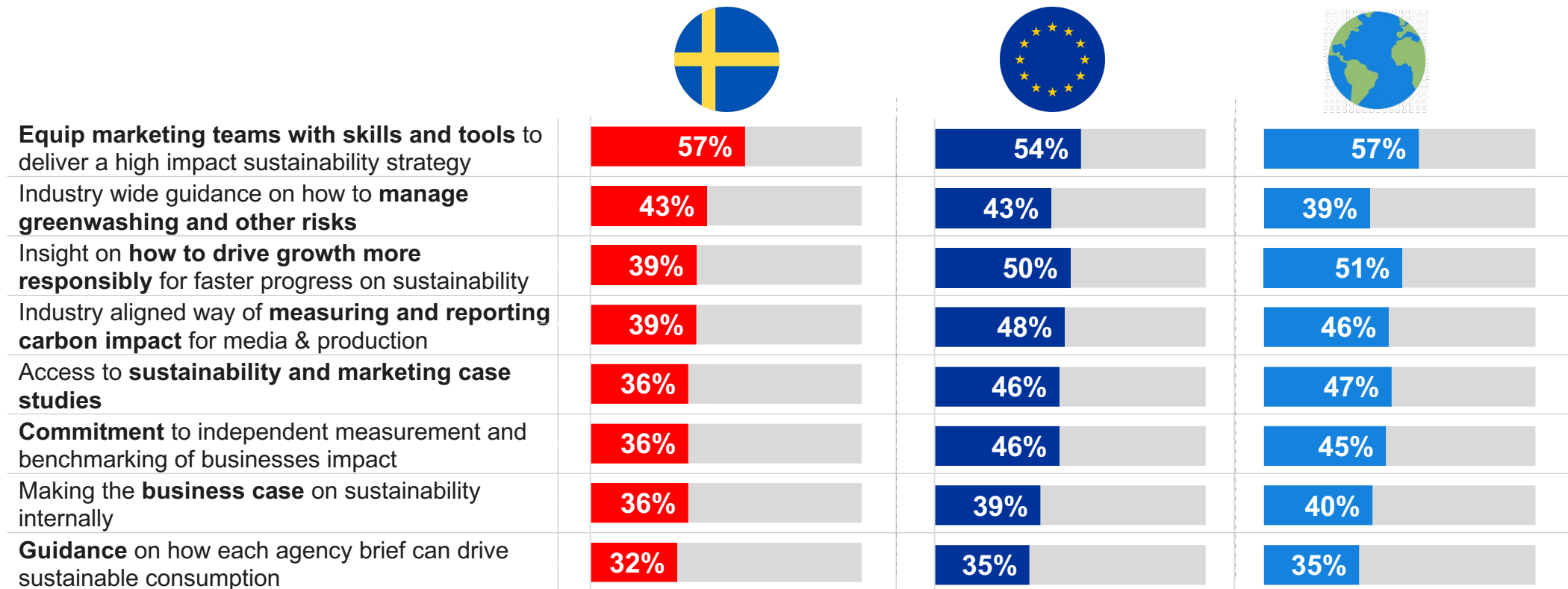
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, January-February 2023
Global Base: 938 | Europe Base: 577 | Sweden Base: 33 respondents

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

What would help to achieve sustainability ambitions?



Training the marketing teams, equipping them with skills and tools, guidance on how to manage greenwashing, access to insights on how to drive growth more responsibly are top elements believed to be of help in achieving sustainability ambitions in Sweden and worldwide.



Snapshot on Marketing levers



% Well advanced & Progressing well

Swedish marketers have **generally rated their organisations as more advanced** in the sustainability journey as compared to their European and global counterparts, especially for **innovation, measurement and communications.**

	Sweden	Europe	Global
Strategy & Portfolio			
Our brand priorities drive sustainable action	58%	46%	46%
We have a good understanding of the broader value chain	58%	56%	54%
We prioritize sustainable impact alongside financial gain in decision making	52%	40%	39%
Our brand's contribution to the planet's well-being is clearly stated	51%	47%	45%
Innovation			
We take risks and experiment to unlock transformative change	50%	31% ↓	33% ↓
We innovate to transform the entire portfolio versus an adjacent sustainable portfolio	43%	35%	33%
We give emphasis to radical innovation to change the category rules/invent new business models	40%	28%	30%
Measurement			
We prioritise longterm sustainable impact over shortterm financial gain in decision making	54%	36% ↓	35% ↓
We consistently consider the impact of our investment decisions on the planet	47%	35%	35%
We have a trusted approach to measure the impact of our actions	43%	32%	34%
Environmental objectives are part of our performance appraisal and bonus scheme	34%	23%	26%
Communication			
Our communications are based on robust evidence in line with regulations	63%	51%	49%
Good understanding and vision of what sustainable living looks like in our categories	60%	47%	45%
Environmental claims are based on the full lifecycle of our products/business	57%	42%	39% ↓
Normalise sustainable behaviour and lifestyle in communication	53%	46%	44%
Sustainability impact and KPIs are an integrated part of every communication brief and evaluation	30%	29%	28%
Partnership & Collaboration			
We collaborate beyond our category to dramatically reduce the industry's climate impact	43%	35%	35%
We are part of a companywide team seeking to make our supply chain more sustainable	39%	39%	39%
Our P&L (profit & loss) policy incentivises us to serve the planet and stakeholders	32%	26%	26%
We measure and incentivise our agency partners on our sustainability objectives	25%	23%	24%

Cell colours highlight the higher/lower values

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 | Sweden Base: 33 respondents

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





4. Sustainability leadership



Defining the sustainability strategy

The main roles involved in designing and shaping the sustainability strategy in Sweden are the **Cross-functional teams** and the **CEO**. 2 in 3 indicated to have a Chief Sustainability Officer, mostly reporting directly to the CEO.

Who is involved in designing the sustainability strategy?

			
Crossfunctional teams	79%	48%↓	45%↓
Chief Executive Officer	75%	58%	60%
The Board	71%	68%	62%
Chief Sustainability Officer	64%	50%	46%↓
Chief Marketing Officer	64%	55%	53%
Chief Financial Officer	61%	30%↓	31%↓
Corporate Communications/PR	50%	47%	47%
Procurement/Sourcing	46%	38%	36%
Chief Strategy Officer	39%	27%	26%
Human Resource Groups	29%	26%	26%
Legal	29%	21%	22%
Public and government affairs	29%	20%	23%

Who does the Chief Sustainability Officer report into*?

			
Chief Executive Officer	56%	50%	55%
Public and government affairs	11%	4%	7%
Chief Strategy Officer	11%	8%	9%
The Board	6%	35%↑	32%↑
Someone else	6%	11%	10%
Human Resources	6%	2%	4%
Procurement/Sourcing	6%	2%	3%

*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 | Sweden Base: 33 respondents

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

Thoughts on improving the sustainability strategy

- 01 Create/ incorporate sustainability/ climate goals
- 02 Drive/ focus on sustainability
- 03 Involve marketing in the sustainability process
- 04 Provide training/ education to consumers/ internally
- 05 Engaging all departments/ teams to implement the strategy

In Swedish marketers' words...



“Secure that sustainability is an integrated and prioritised part of the company’s business strategy. Then the rest will follow!” (Marketing, Global role)

“In marketing, there must be a communication and CRM budget for each sustainable product. The marketing team By using marketing communication as a tool to inform consumers and drive a more sustainable lifestyle and consumer behaviour that still gives a good potential to drive profitable business. Marketing should be more focused on long term profitability than short term growth from a company perspective.” (Marketing, National role)

“A shared sustainability marketing plan between the marketing organisation and the sustainability organisation.” (Sustainability/CSR, Global role)

“Sustainability is our strategy. Continue the cross-collaboration - as one team - across strategy - sustainability - brand - marketing.” (Brand strategy & communication, Global role)

“Make the organization stop working in silos so that the task is prioritized all over the company..” (PR/Comms, National role)

“Formulating and educating internally on the business case.” (Marketing, National role)

“Creating sustainability communication that breaks through the noise.” (Marketing, Global role)

5. Key learnings

Executive Summary

1. Setting the sustainability context:

- ✓ **Almost universal agreement** with the definition of 'sustainability', among marketers from Sweden and worldwide.
- ✓ Swedish marketers generally agree that **brands should be responsible**, and that **marketing function can make a difference** in the sustainability journey. Most also feel that sustainability agendas must be **more ambitious** for bigger and timely impact.

2. Progress on the sustainability journey:

- ✓ Sweden is leading in terms of progress - **88% are taking actions** related to the UN's SDGs. Two thirds claim they have the **relevant goals fully embedded into their organisation strategy**.
- ✓ Senior marketers in Sweden are **confident on internal engagement, innovation and translating sustainability into brand strategy and action** – and need to **focus on measuring sustainability efforts**.
- ✓ Main challenges in the sustainability space refer to **lack of robust and transparent way of measuring and knowing how to act**. When it comes to opportunities, **innovation, consumer education and defining new business models** stand out.

3. Sustainability performance across marketing levers

- ✓ Swedish marketers have generally rated their organisations as **more advanced in the sustainability journey** as compared to their European and global counterparts, especially for **innovation, measurement and communications**.
- ✓ 58% claim that **sustainable actions are a priority** for the brand and majority **focus their sustainable innovation efforts on recycling**
- ✓ **Training the marketing teams, equipping them with skills and tools**, guidance on how to **manage greenwashing, access to insights** on how to drive growth more responsibly are top elements believed will help in achieving sustainability ambitions in Sweden and most other markets.

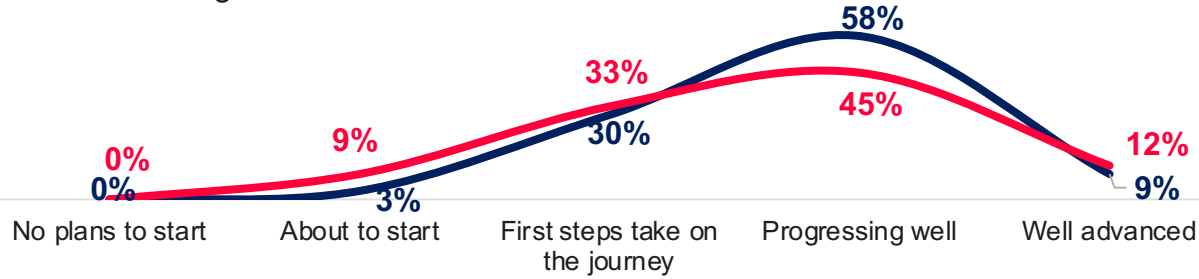
4. Sustainability leadership:

- ✓ The main roles involved in designing and shaping the sustainability strategy in Sweden are **Cross-functional teams** and the **CEO**. 2 in 3 indicated to have a Chief Sustainability Officer, mostly reporting directly to the CEO.

Organisational and marketing sustainability journey maturity



— At organisation level
— Marketing function



Thoughts on improving the sustainability strategy



- 01 Create/ incorporate sustainability/ climate goals
- 02 Drive/ focus on sustainability
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Main responsible roles for shaping the sustainability strategy



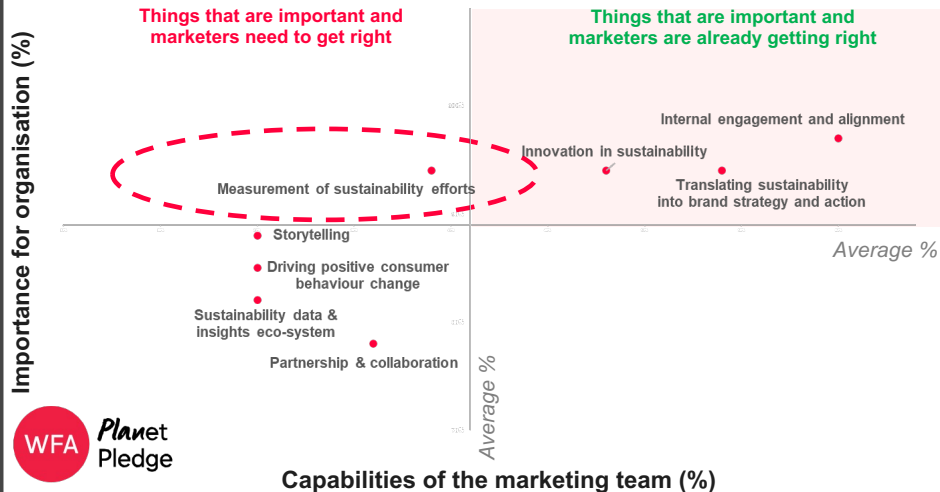
Main Opportunities

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

Main Challenges

- No robust and transparent way of measuring progress
- Staying on top of discussions and knowing how to act
- Lack of P&L policy that treats planet and profit equally

Marketing and Sustainability - Gap analysis



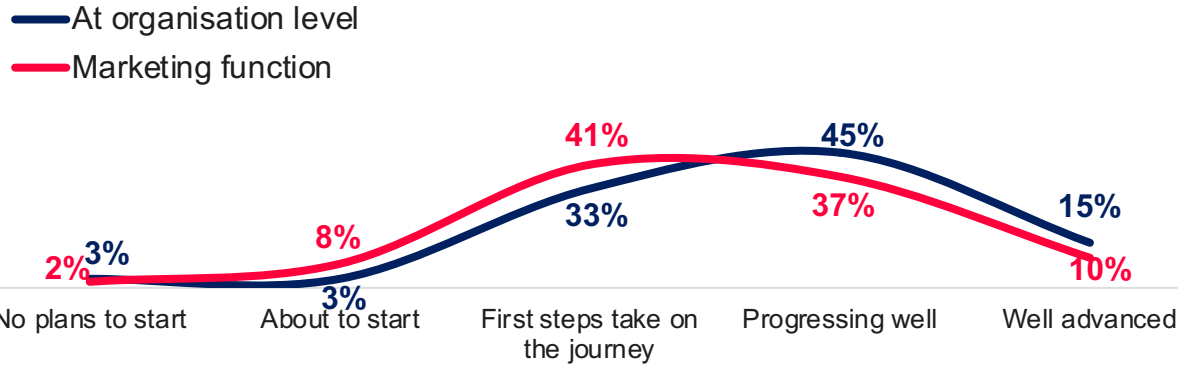
Progress on sustainability journey – Most advanced

- ✓ Our brand priorities drive sustainable action (58%)
- ✓ We take risks and experiment to unlock transformative change (50%)
- ✓ We prioritise long-term sustainable impact over short-term financial gain in decision making (54%)
- ✓ Our communications are based on robust evidence in line with regulations (63%)
- ✓ We collaborate beyond our category to dramatically reduce the industry's climate impact (43%)

Progress on sustainability journey – Least advanced

- Our brand's contribution to the planet's well-being is clearly stated (51%)
- We give emphasis to radical innovation to change the category rules/invent new business models (40%)
- Environmental objectives are part of our performance appraisal and bonus scheme (34%)
- Sustainability impact and KPIs are an integrated part of every communication brief and evaluation (30%)
- We measure and incentivise our agency partners on our sustainability objectives (25%)

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



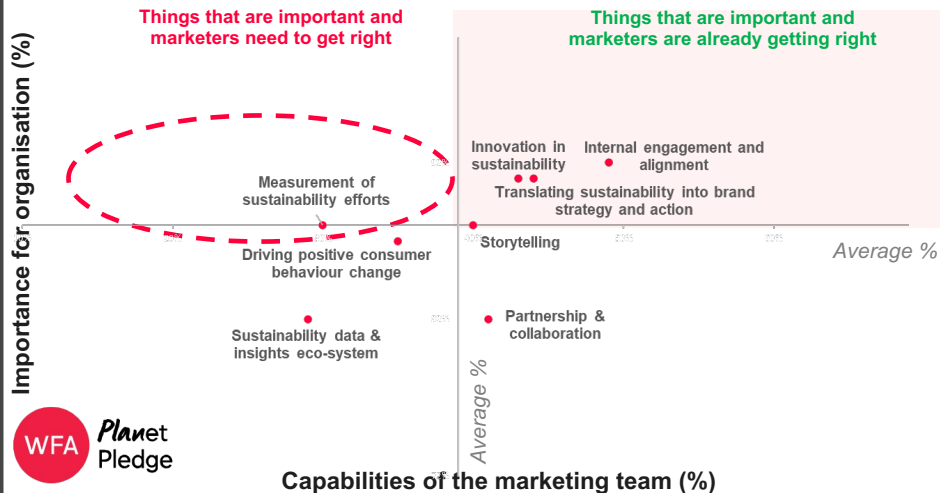
Main Opportunities

- 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



Progress on sustainability journey – Most advanced

- ✓ We have a good understanding of the broader value chain (56%)
- ✓ We innovate to transform the entire portfolio versus an adjacent sustainable portfolio (35%)
- ✓ We prioritise long-term sustainable impact over short-term financial gain in decision making (36%)
- ✓ 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 (39%)

Progress on sustainability journey – Least advanced

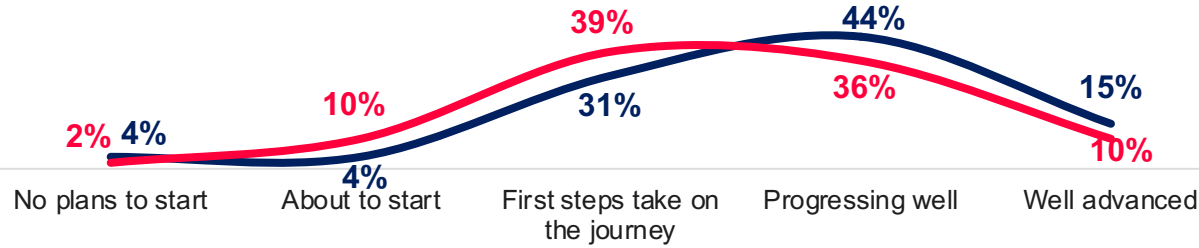
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Organisational and marketing sustainability journey maturity



— At organisation level
— Marketing function



Thoughts on improving the sustainability strategy



- 01 Create/ incorporate sustainability/ climate goals
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- 05 Measure effect /impact of climate

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



Progress on sustainability journey – Most advanced

- ✓ We have a good understanding of the broader value chain (54%)
- ✓ We innovate to transform the entire portfolio versus an adjacent sustainable portfolio (33%)
- ✓ We consistently consider the impact of our investment decisions on the planet (35%)
- ✓ Our communications are based on robust evidence in line with regulations (49%)
- ✓ We are part of a companywide team seeking to make our supply chain more sustainable (39%)

Progress on sustainability journey – Least advanced

- We prioritize sustainable impact alongside financial gain in decision making (39%)
- We give emphasis to radical innovation to change the category rules/invent new business models (30%)
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THANK YOU!

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