

SHAPING THE ESG LANDSCAPE

CREATING RESPONSIBLE BUSINESSES FOR CONSUMERS

September 2023

AGENDA



Unveiling the Trends, Challenges,
and Opportunities in ESG



Engage with the Experts



Open Discussion

LEARNINGS FROM IPSOS' LATEST FINDINGS

Unveiling the Trends, Challenges,
and Opportunities in ESG

1



WHEN IT COMES TO WHAT WORRIES THAILAND, THE TOP ISSUES COVER E, S, AND G

Q Which three of the following topics do you find the most worrying in your country?
Thailand average

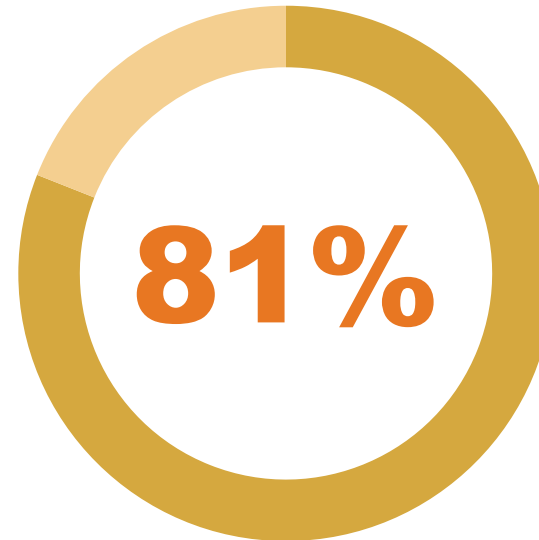




CONSUMER PERSPECTIVE: IPSOS GLOBAL TRENDS (TH) SUGGEST THAT THERE IS POTENTIAL VALUE IN ESG FOR COMPANIES

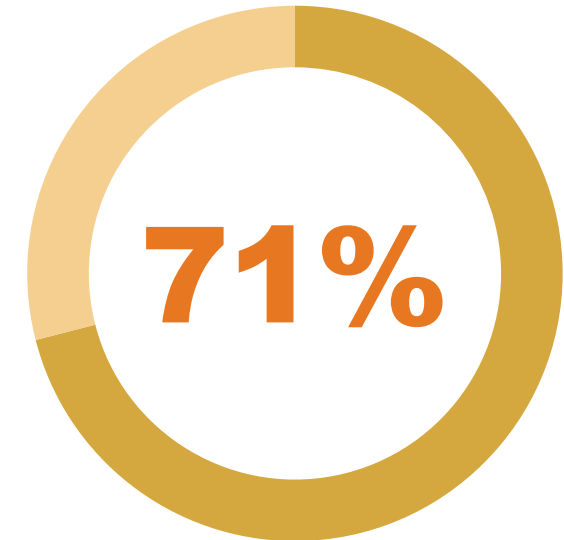
Brands can make money and support good causes **at the same time**

% Agree



Try to buy products from brands that act responsibly, **even if it means spending more**

% Agree



Source: Ipsos Global Trends 2023, September–November 2022, Global N= 48,541

IPSOS BETTER BRANDS FRAMEWORK: IF YOUR BUSINESS ISN'T SUSTAINABLE, IT ISN'T SUSTAINABLE

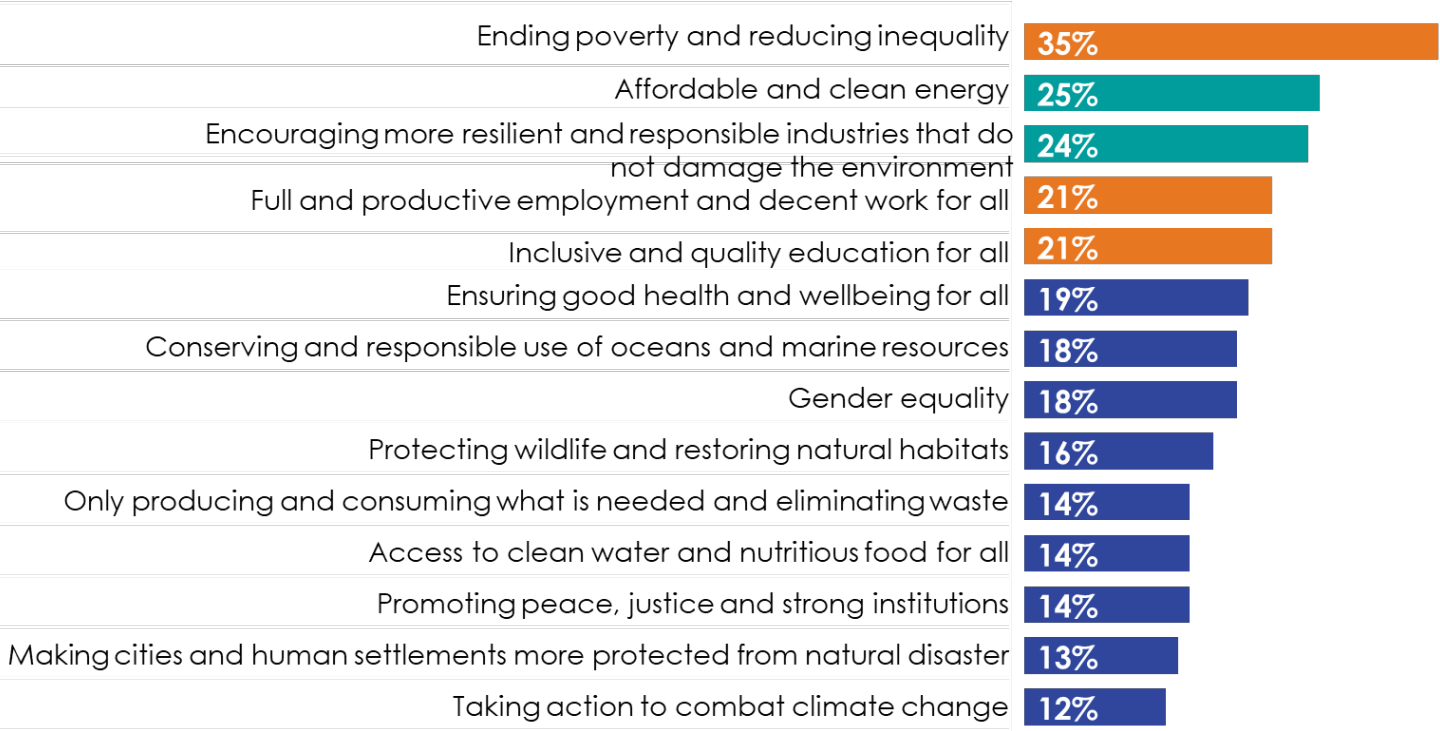


Ipsos research concludes that businesses can only make their sustainability actions mutually beneficial to both themselves and wider society if their engagements are authentic, credible, transparent and effective.

The ultimate sustainability strategy will be a manageable set of ESG dimensions. A mix tailored to the unique characteristics of the business and one which recognizes the intersectionality of all ESG factors.

CONSUMER PERSPECTIVE: SOCIAL THEMES GAIN THE MOST ASSOCIATION TO ‘SUSTAINABILITY’

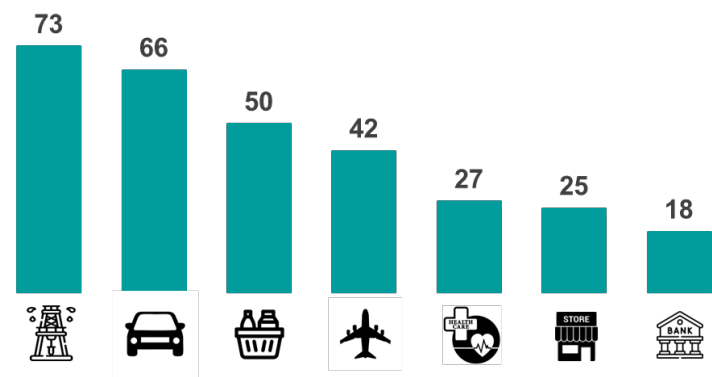
Q Which of the following topics, if any, do you most associate with the word “sustainability”? Please select the top three.



WHOSE ROLE AND RESPONSIBILITY IS IT?

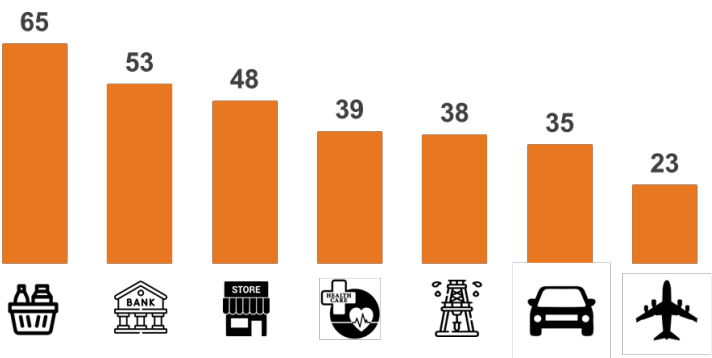
ENVIRONMENTAL:

Majority of consumers feel that energy and automotive sectors should play an important role in conserving the environment.



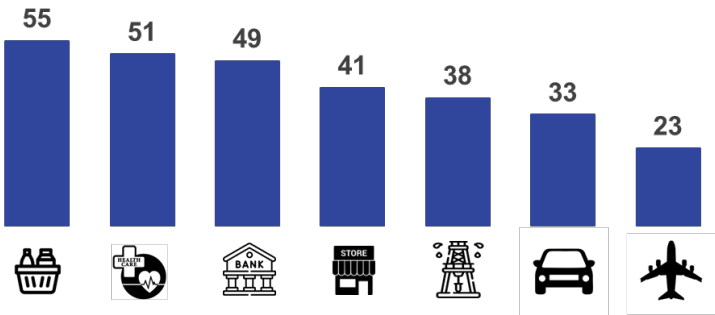
SOCIAL:

Consumers often look to FMCG, financial, and retail industries to play a more prominent role in helping society.



GOVERNANCE:

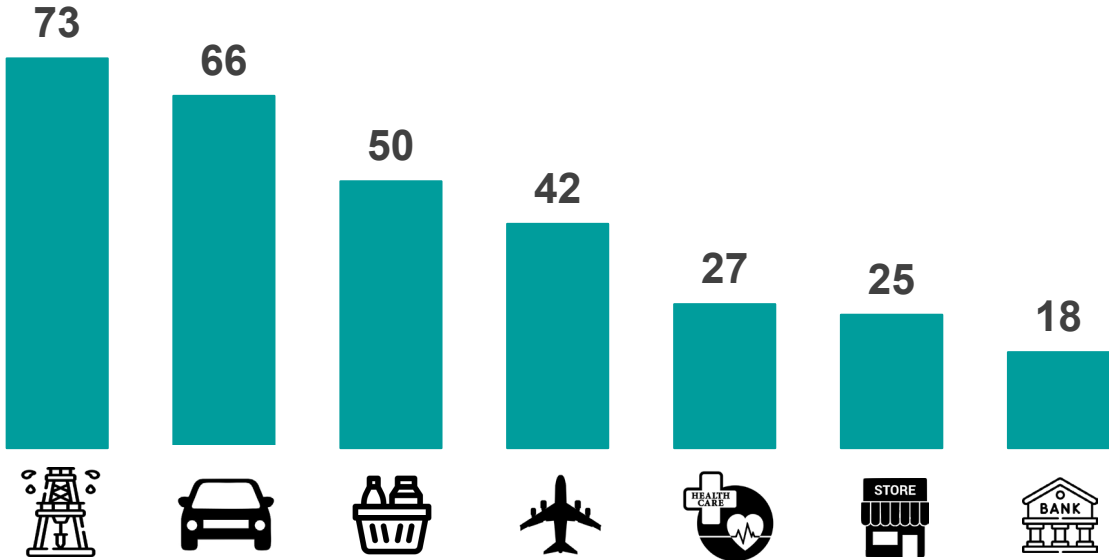
Meanwhile citizens expect most industries to practice good governance.





ENVIRONMENTAL ASPECT:

Majority of consumers feel that energy and automotive sectors should play an important role in conserving the environment



ENVIRONMENTAL ASPECT:

Reducing waste and pollution, greenhouse gas emission, and using eco-friendly packaging top the list that consumers want companies to focus on.



53%
Reduce
waste and
pollution

46%
Reduce
greenhouse
gas emission

25%
Reduce
deforestation

23%
Reduce
resource
depletion

40%
Care for natural
environment

23%
Address
climate
issues

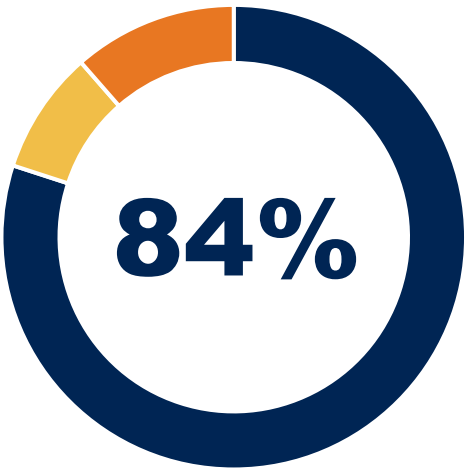
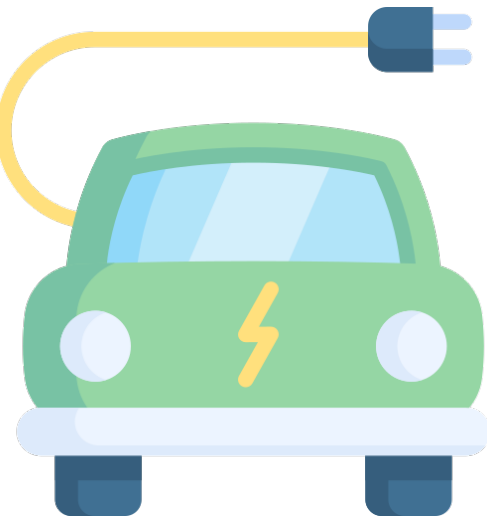
44%
Use
sustainable or
eco-friendly
packaging

35%
Reduce use
of plastic

13%
Reduce water
usage

84% SAY THEY ARE LIKELY TO BUY AN ELECTRIC VEHICLE FOR THEIR NEXT PURCHASE

However, insufficient charging stations may prevent them from doing so



■ Likely ■ Neutral ■ Not likely

More than **4 out of 5** say they are likely to consider EV cars for their next purchase

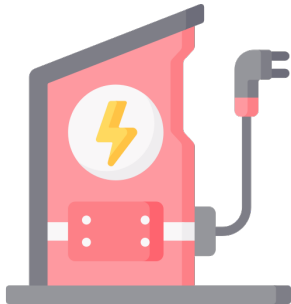
Reasons to buy



70% say it makes them feel like they're doing good for the environment

65% say it saves money on petrol

Reasons NOT to buy



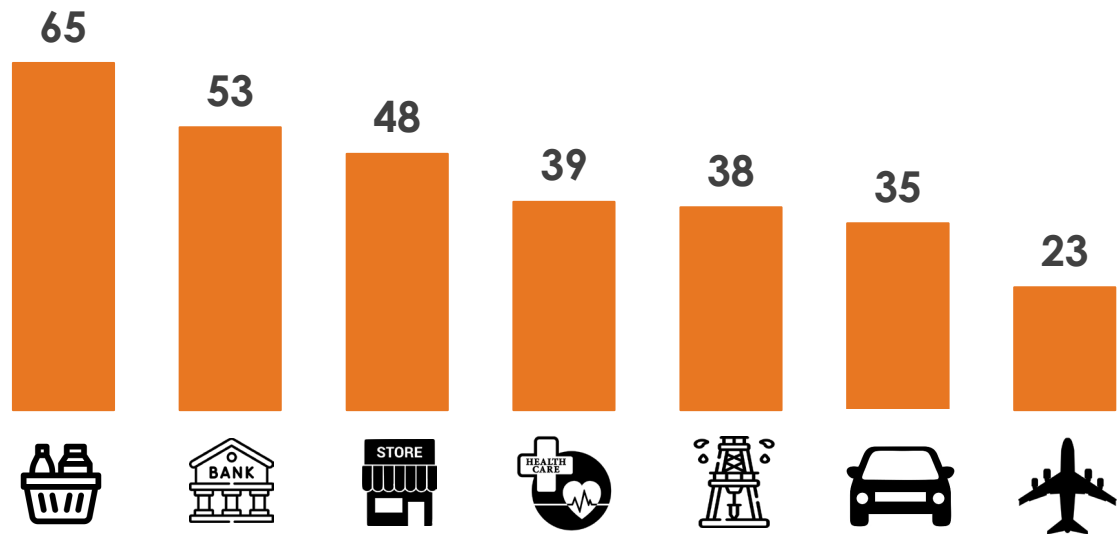
58% insufficient charging station

48% expensive price are factors preventing them from buying EV



SOCIAL PERSPECTIVE:

Consumers often look to FMCG, financial, and retail industries to help them in hard times



SOCIAL PERSPECTIVE:

Better employee's benefits and decent working conditions top the list for many people.



50%

Better
employee's
benefits

41%

Reinforce
equality

40%

Improve
product quality

40%

Improve water
health and safety

47%

Improve
working
conditions

41%

Help the poor
and less
fortunate

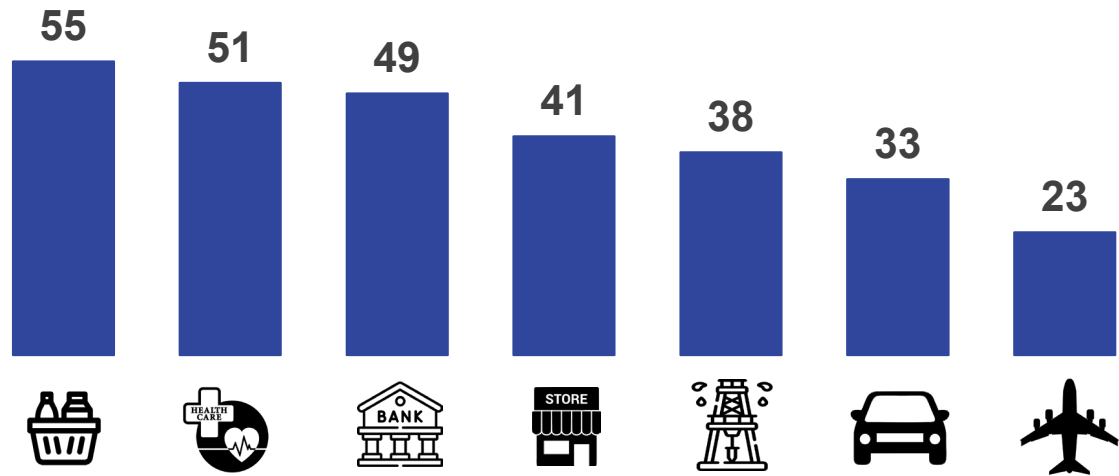
37%

Support local
communities



GOVERNANCE PERSPECTIVE:

Meanwhile citizens expect most industries to practice good governance.



GOVERNANCE ASPECT:

Fair wages, transparency, and no corruption or bribery are what citizens want from business industries.



42%

Pay employees fairly

36%

Provide safe products

25%

Invest in green technology

39%

Demonstrate transparency

31%

Treat business partners fairly

24%

Have solid financial results

37%

End corruption and bribery

30%

Pay fair share of taxes

19%

Not interfering in politics

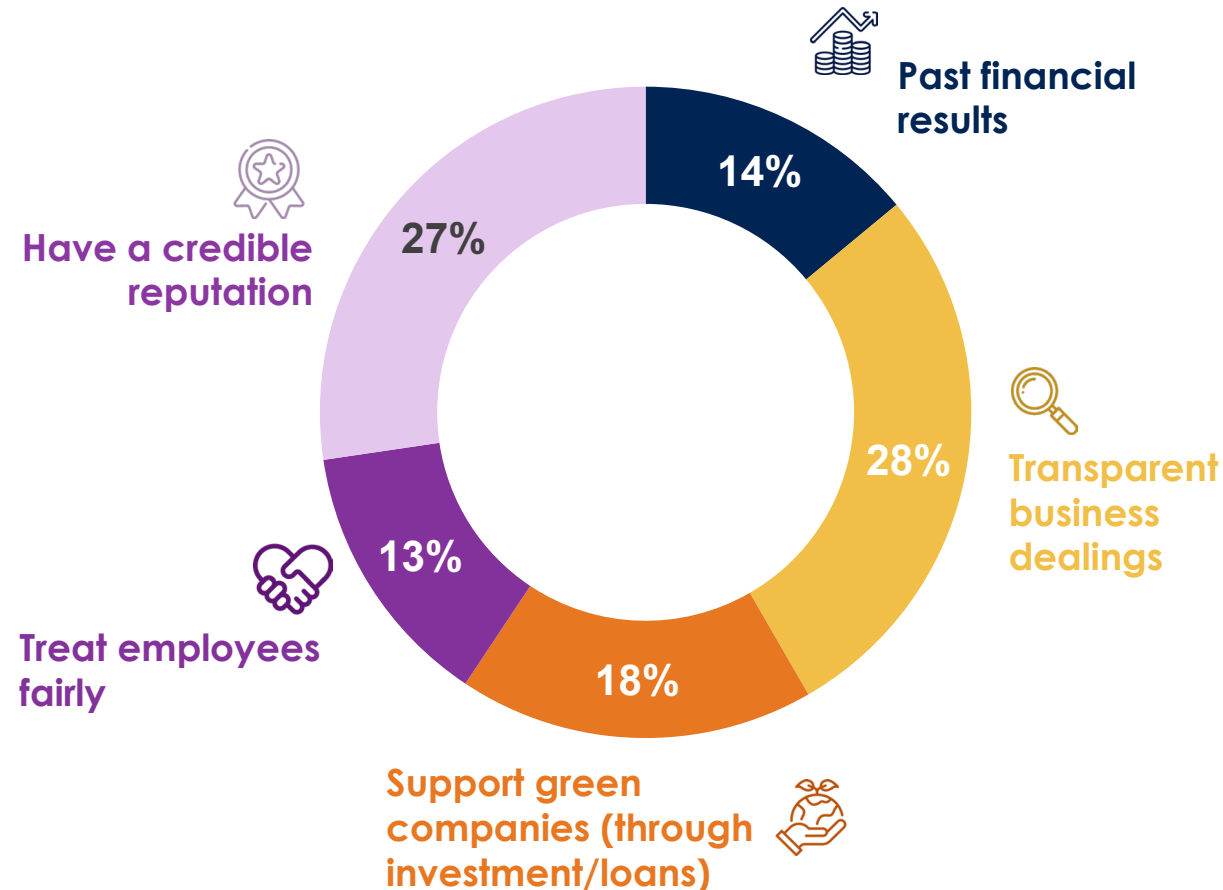
14%

Invest in innovative solution

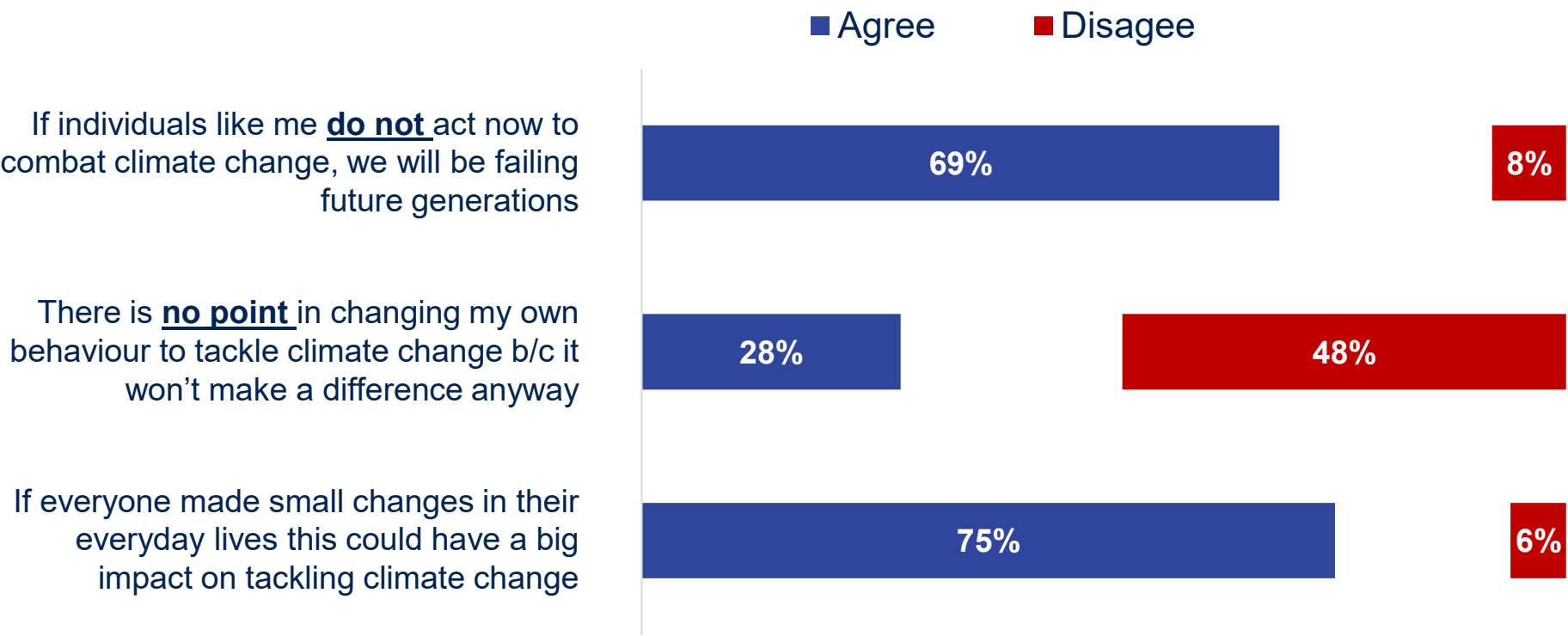
AND TRANSPARENCY PLAYS A CRITICAL ROLE AMONG THOSE LOOKING TO INVEST

Q

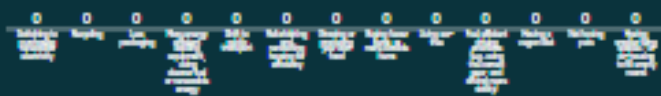
From this list of options, if you were to invest money in a bank, which of these would play a key role in deciding which bank to invest in?



WE KNOW THAT PEOPLE ARE CONCERNED AND WANT TO ACT IN THE BEST INTERESTS OF THE PLANET



Which actions would have most impact on reducing greenhouse gas emissions?

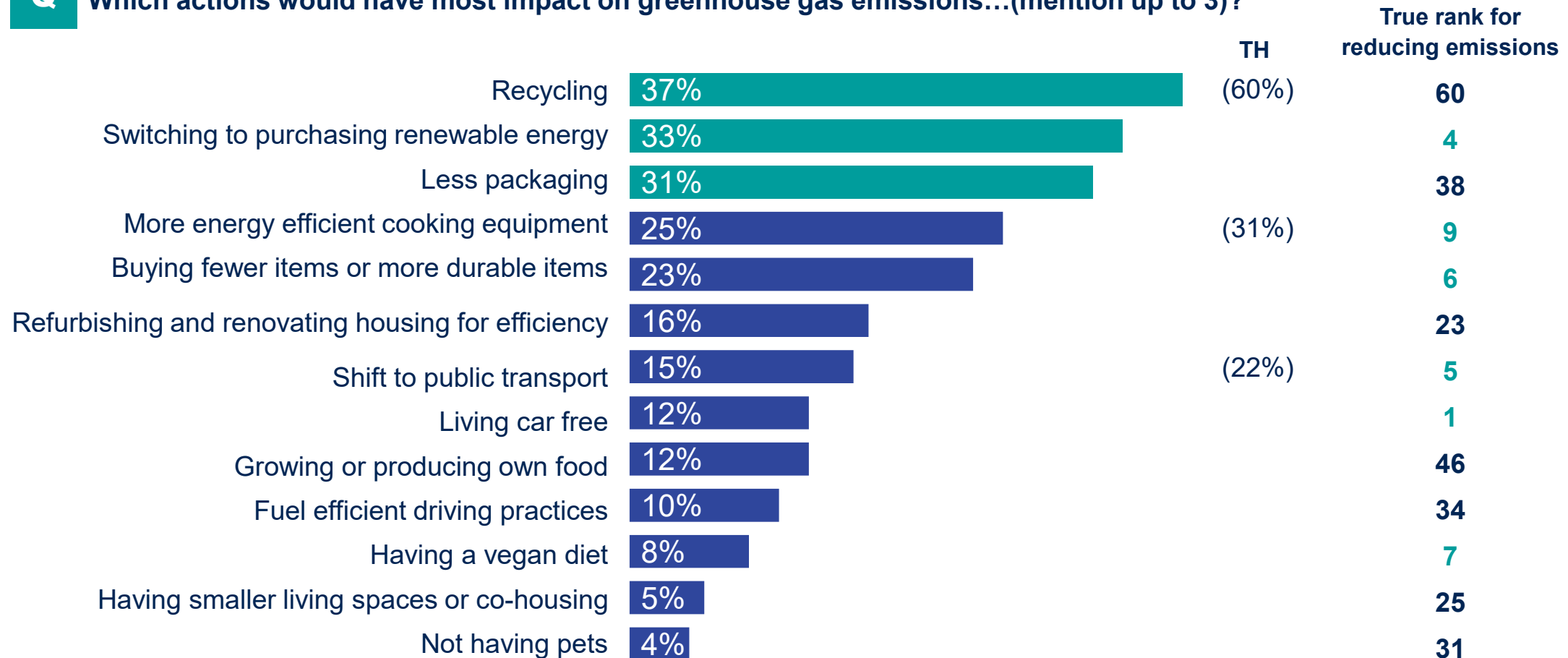


Login to edit this Menti

GLOBALLY, PEOPLE OVERESTIMATE LOW IMPACT CHANGES AND UNDERESTIMATE HIGH IMPACT CHANGES

Q

Which actions would have most impact on greenhouse gas emissions...(mention up to 3)?



GLOBALLY, CONSUMERS FALL INTO MANY DIFFERENT TYPOLOGIES

				
<p> Activists (17%) </p> <p> As consumers, they are a key audience for sustainable products and services. It is the lead benefit and they are willing to pay more for it. </p> <p> They'll look for companies that direct efforts towards sustainability in production. </p>	<p> Pragmatists (29%) </p> <p> Likely to embrace new products/ policies if they are easy to adopt. They are not deterred by cost when deemed reasonable. </p> <p> Companies can entice by using reusable energy and recycled materials in products/packaging. </p>	<p> Conflicted Contributors (18%) </p> <p> Sustainability should be presented as a co-benefit as they are not willing to pay more for ethical/ sustainable products – price prevails. </p> <p> They'll look for companies to limit their contribution to chemical pollution. </p>	<p> Busy Bystanders (16%) </p> <p> Convenience and routine are prevailing factors in their choice. </p> <p> Can be enticed by companies conserving energy and that offer products/ packaging that use recycled materials. </p>	<p> Disengaged Denialists (19%) </p> <p> Limited 'care' towards the environment. Possible to win over by initiatives with sustainability as a co-benefit. </p> <p> A quarter do not believe companies should focus on limiting their environmental impact. Those that do look for them to conserve energy and use recycled materials in products/packaging. </p>
<p> WILL PAY PREMIUM PRICE </p>		<p> SUSTAINABILITY IS 'CO-BENEFIT' </p>		



**TALKING ONLY ABOUT
SUSTAINABILITY DOES NOT IMPROVE
THE CHANCES OF MAKING
ADVERTISING GROW YOUR BRAND.**

**A BALANCE OF SUSTAINABILITY AS
'CO-BENEFIT' IS MORE EFFECTIVE.**

Creative Effect vs. Norm



WE KNOW THAT SUSTAINABILITY FOCUSED INNOVATION CAN GENERATE A POSITIVE CONSUMER RESPONSE



Concepts with these
keywords in their name...

“ sustainable, plastic,
recyclable, biodegradable,
compostable, eco, enviro,
planet, carbon, waste, rPET,
CO2, plant-based, refill



...Perform better

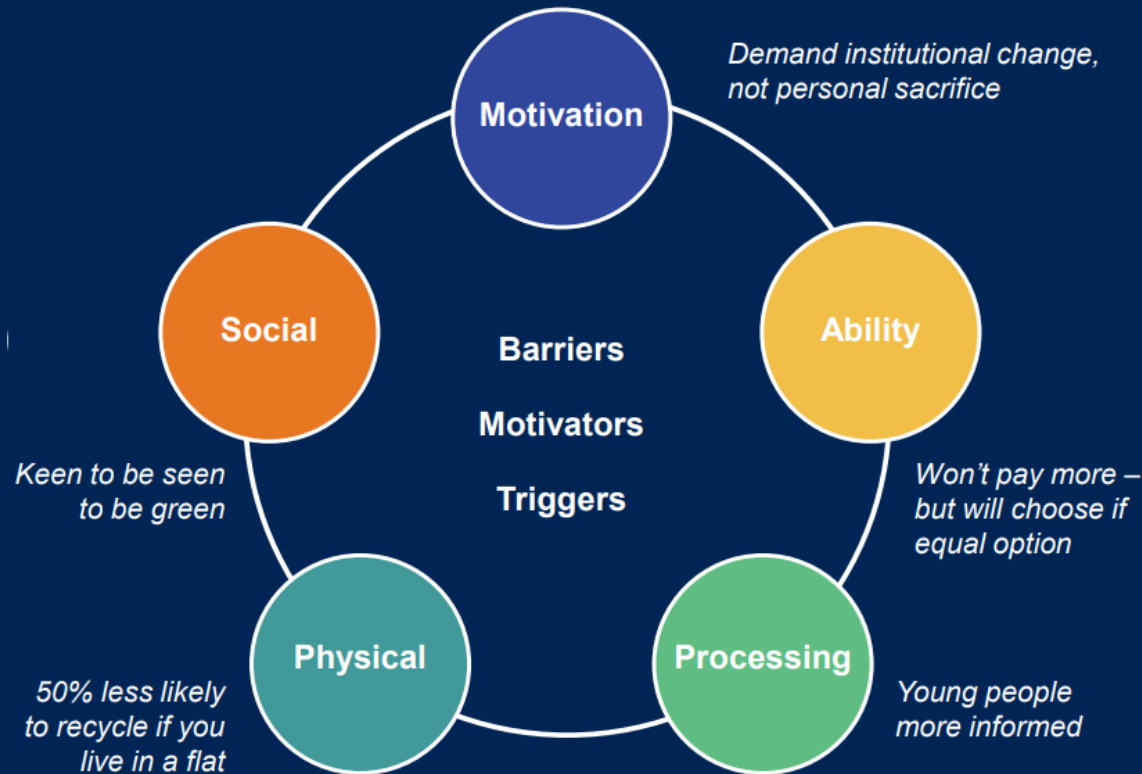
more relevant
more different
slightly more believable
slightly less expensive
higher trial (+4% increase)



"IT'S NOT EASY
BEING GREEN!"

KERMIT, THE FROG


CONSUMERS NEED TO BE SUPPORTED TO ENACT SUSTAINABLE BEHAVIORS. CRITICAL TO THIS IS FOR INDUSTRY AND GOVERNMENT TO HELP PEOPLE TO CLOSE THE SAY-DO GAP.



To encourage consumer action and drive large-scale change, an understanding of these attitudes and coordination of actions is needed.

In Ipsos' view, when seeking to elicit behavior change there is real risk if governments and business focus solely on sustainability in their marketing and communications efforts.

When seeking to entice consumers to action, it can be advantageous to position the ask as a benefit but linked to what's important (e.g. saving money, saving time, more healthy) rather than leading with sustainability as the lead benefit (e.g. do this and it's better for the planet).

A close-up photograph of a person's hand gently touching a tree trunk covered in vibrant green moss. The background is a soft-focus forest scene. The overall tone is natural and serene, with a teal overlay on the left side where the text is located.

Ipsos

How can we help?

To help businesses and institutions best design their ESG strategy, Ipsos has developed a 5-step framework

ORIENTATE	FOCUS	ACT	TALK	EVALUATE
<p>What is the ESG landscape and where should we start?</p> <p>What's happening now and what's next?</p> <p>Why should we care and what is the business case ?</p>	<p>Where should the business focus its efforts?</p> <p>What is the strategy and overall road-map?</p>	<p>How can we create new offerings that are more sustainable?</p> <p>How can we refresh our existing efforts and engage citizens and consumers?</p>	<p>How do we talk about our efforts?</p> <p>How do we position our brand, business or organisation?</p> <p>How to influence positive behaviour change?</p>	<p>How do we systematically monitor and track what's working and not?</p>

And our specific ESG Sustainability Index can deliver these answers

1

Understand how your brand performs relative to its competitors in key ESG areas

2

Identify how your ESG initiatives work alongside other strategies to shape positive expectations of your brand

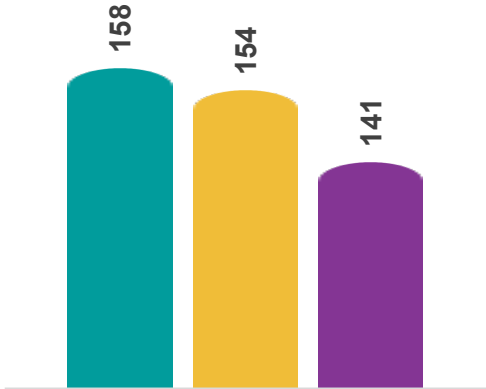
3

Spot the most effective ESG messaging opportunities

4

Determine which groups prioritise ESG and which are driven more by other factors

SUSTAINABILITY INDEX



Environment Social Governance

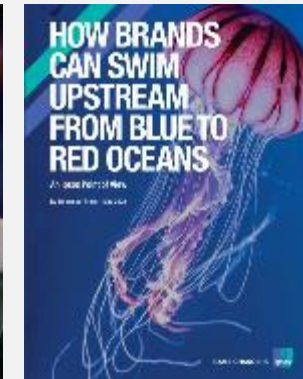
Ipsos thought leadership helps us to tell ‘real world’ stories: we bring the outside in to put together both global and local perspective

Examples of thought pieces and research updates

At Ipsos we invest heavily in research that informs our thought leadership so that the recommendations we make to clients are based on facts rather than intuition. In recent months, the Ipsos experts have focused on understanding customer attitudes and behaviors after the pandemic.

- ▶ **Global Advisor** - The survey instrument is conducted monthly in 31 countries around the world, with **Earth Day** a session focused on public opinion on climate change
- ▶ **The Knowledge Centre** is our platform for sharing a plethora of global, regional and local thought pieces from Ipsos experts on topics of different categories PLUS a broad base of expert views and self-funded research. We use this resource to look to the future and understand how consumers are adapting as the world changes.
- ▶ **Papers/verticals** dedicated to different topics.

Relevant areas will be proactively incorporated into the tracking program to create culturally relevant insight and context and ensure that findings from the tracking program are interpreted with a comprehensive understanding of consumer, markets and emerging trends



SHAPING THE ESG LANDSCAPE

CREATING RESPONSIBLE BUSINESSES FOR CONSUMERS

PR Contact: Sirada.Kulphaisal@Ipsos.com