THE NETHERLANDS

OFFICIAL REPORT 2022

Europe’s Largest Brand Study on Sustainability

SUSTAINABLE BRAND INDEX

ABOUT THE REPORT

This report was written by SB Insight AB. SB Insight is an insight agency based in Stockholm, Sweden and the founder of Sustainable Brand Index™.

SUSTAINABLE BRAND INDEX™

Sustainable Brand Index™ is Europe's largest independent brand study on sustainability, founded in 2011 by SB Insight in Sweden. Sustainable Brand Index™ measures the sustainability perception of brands across industries and countries. It is an independent study consisting of more than 1 500 brands, 35 industries, and 70 000 consumer-interviews across Europe (the Nordics, the Netherlands & the Baltics). In doing so, Sustainable Brand Index™ shows how brands are perceived within sustainability, why they are perceived this way, and what to do about it. Next to yearly brand rankings and official reports, Sustainable Brand Index™ provides brands with data-driven sustainability insights, tailored analysis and strategic recommendations.

SUSTAINABLE BRAND INDEX

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2022

Europe's largest brand study on sustainability

WHO WE ARE

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Sustainable Brand Index™ was founded in 2011 by the Swedish insight agency SB Insight. Sustainable Brand Index™ is an independent study, owned and run entirely by SB Insight. The company is based in Sweden and is privately owned by its employees. SB Insight finances Sustainable Brand Index™ 100%.

69 850
Consumers

1 507
Brands

35
Industries

8
Countries

Based on macro and micro trends, consumer behaviours, and brand analysis, the study seeks answers to the following questions:

- How does sustainability affect brands?
- How are brands perceived within the different areas of sustainability and why?
- What can brands do to change and improve this perception?
- What are the consumer's attitudes and behaviours regarding sustainability, how do they change over time, and how do they affect brands?
- Which future trends and developments within sustainability do brands need to be aware of and respond to?

What we do

RANKINGS

Our yearly rankings show how brands are perceived on sustainability by their important stakeholders. Brands are selected independently based on market share, turnover and general brand awareness.

OFFICIAL REPORTS

Our official reports contain the complete ranking of each country over time, accompanied with key sustainability insights and stakeholder data.

> *The Sustainable Brand Index™ team provides us with sound insights and holistic analyses. They are well informed on sustainability issues. Our report brings value to our strategic planning and communications*

CHRISTINA GUSTAFSSON
NORDIC CONSUMER
& BUSINESS INSIGHTS MANAGER,
MCDONALD'S

LEARN MORE

TAILORED INSIGHTS & ANALYSIS

We provide brands with brand-specific data insights, a tailored analysis and strategic tools. Our unique data and sustainability insights help brands understand how they are perceived within sustainability, why they are perceived this way and how to build a more sustainable brand. Yearly, we provide brands internationally with tailored sustainability insights that help them in their goal setting and strategic work, as well as external and internal communication.

Our purpose

The purpose of Sustainable Brand Index™ is to drive the agenda, visualise the value of sustainable branding and increase the knowledge on sustainability within branding and communication. Based on data-driven insights, Sustainable Brand Index™ is able to identify important gaps between how brands think they are perceived on sustainability and the reality. By analysing important trends, mapping stakeholders' attitudes and behaviours and evaluating several materiality areas, the study provides brand-specific data and strategic tools.

In doing so, Sustainable Brand Index™ encourages brands to improve their work and dares them to communicate about sustainability. The more brands talk about sustainability, the more consumers will know, care and demand. It creates a positive cycle for transparency and sustainability. Together we are on a mission to create sustainable brands.

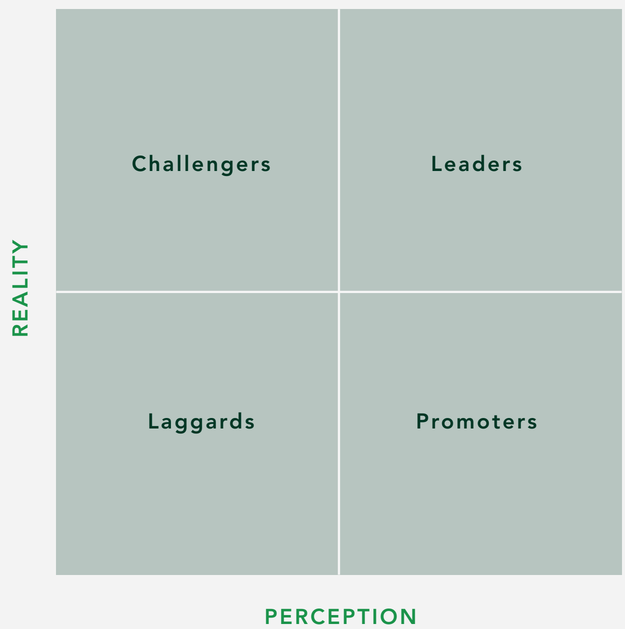
Sustainable Brand Index™ has been an early "unifying force" on the market and has played an important role in demonstrating how sustainability can strengthen a brand and be linked to the commercial agenda

JONAS CARLEHED
SUSTAINABILITY MANAGER
IKEA SWEDEN

Perception vs. Performance - A new dimension of Sustainable Brand Index™

It is important to note that Sustainable Brand Index™ measures how brands are perceived on sustainability. Thus, we do not measure the actual level of sustainability operations in this study. The perception of each actor's sustainability efforts is largely based on the consumers' gut feeling, but in some cases, also on their knowledge. In summary, we measure how much or how little the consumers know about each actor's sustainability responsibility as well as how they value each actor's sustainability responsibility.

The reason for doing this is that we think it is essential to track consumer maturity in sustainability. We are convinced that if we talk more about how brands are perceived, people will naturally be more interested in how brands perform. We want to create a positive circle, where our focus on perception leads to consumers engaging more in sustainability performance and questioning brands around what they do.



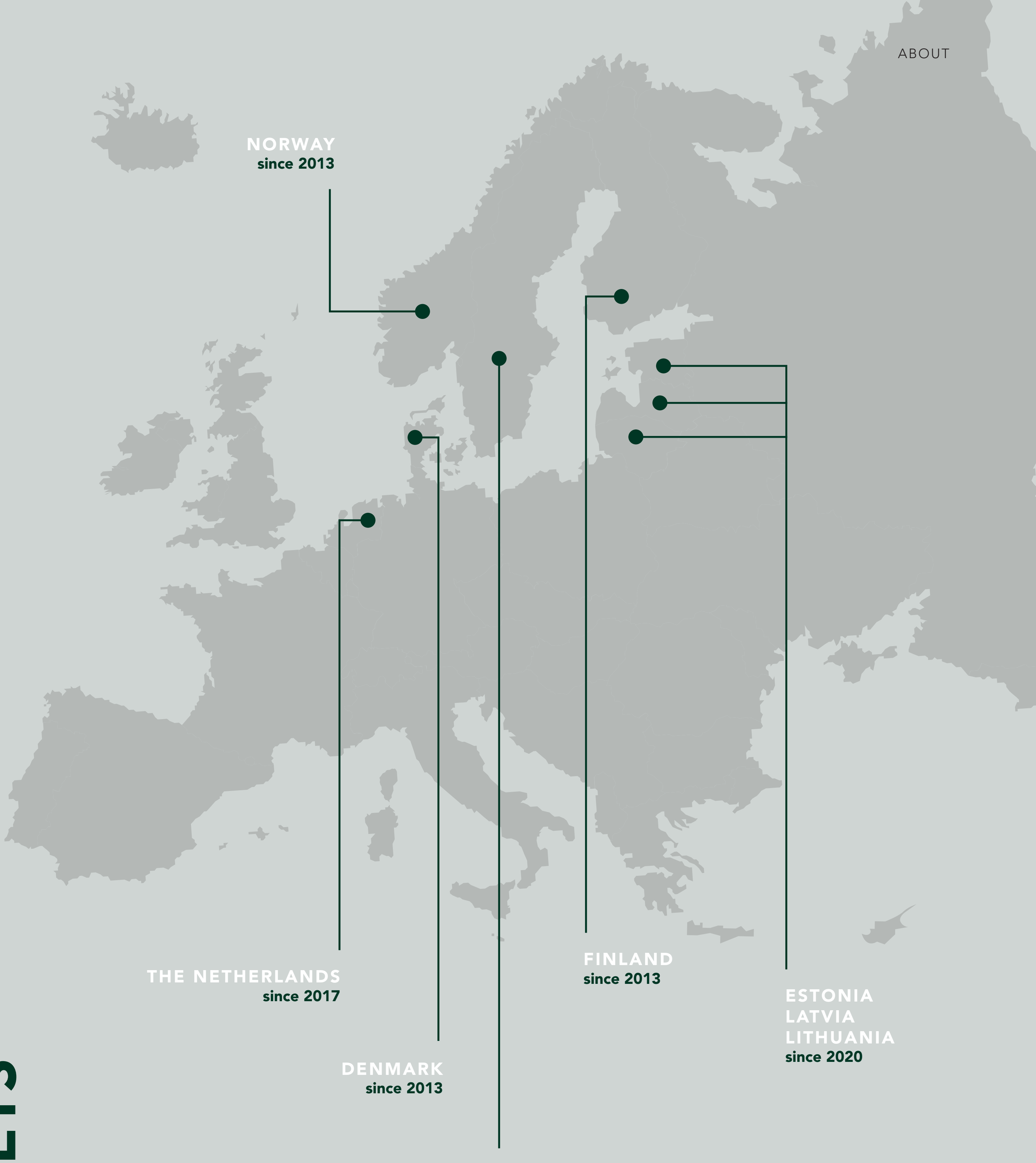
> ***We want to create a positive circle, where our focus on perception leads to consumers engaging more in sustainability performance and questioning brands around what they do***

To further deepen our work with Sustainable Brand Index™, we are now working on adding the performance dimension to the study as well. It is an ongoing project where we are working with leading experts in sustainability metrics to see how we can visualise the difference between sustainability perception and actual performance. This is a long-term project that we hope will create interesting discussions and speed up the progress we so desperately need.

If you want to know more about this project, please contact us at info@sb-index.com.

CONTACT US

OUR MARKETS


NORWAY
since 2013
FINLAND
since 2013
THE NETHERLANDS
since 2017
ESTONIA
LATVIA
LITHUANIA
since 2020
DENMARK
since 2013
SWEDEN
since 2011

Data collection

Sustainable Brand Index™ B2C is an independent three-part study, based on desk research and two quantitative web-surveys among the target audience.

TARGET AUDIENCE & RESPONDENTS

The target audience in Sustainable Brand Index™ B2C is the general consumer or public, 16-75 years, in each country.

- In accordance with our policy, we do not use panels that are self-recruited. The respondents come from so-called consumer panels belonging to a subcontractor. The panels thus consist of regular citizens in each country that have been recruited to answer questions at even and uneven intervals.
- In the surveys, we set quotas for gender, age and geography.
- The data is weighted for further fine-tuning.
- The average length of the surveys is approximately 10 minutes. On average every respondent evaluates a random selection of around 20 brands.
- The study has been conducted during December 2021 to February 2022.

BRAND SELECTION

Per country, brands are selected yearly across a variety of industries, based on a set of independent parameters. Parameters include: market share on the respective market, turnover and general brand awareness. The purpose of these criteria is to create a selection that mirrors the brands that consumers meet in their everyday life. Every brand is evaluated by at least 1 000 people.

Brands cannot choose to be included or excluded from the study and the annual results of Sustainable Brand Index™ are open to the public.

DEFINITION OF SUSTAINABILITY

The definition of sustainability in Sustainable Brand Index™ is based on the UN Global Goals for Sustainable Development (SDG). The ranking of Sustainable Brand Index™ is however only the tip of the iceberg in the study. We measure consumer perception in relation to sustainability in different ways, by diving deeper into specific attitudes, knowledge levels, behaviours and materiality areas relevant to each industry.

THE RANKING SCORE

The ranking of Sustainable Brand Index™ shows how brands are perceived on sustainability according to consumers in the respective country. Ranking scores are based on two main parts; environmental responsibility and social responsibility. The final score of each brand is based on the percentage of consumers who assess a company's sustainability efforts as good (4) or very good (5) on a scale of 1-5 + "don't know". The maximum score a brand can get is 200%. A brand that has 200%, performs very well within both environmental (100%) and social responsibility (100%) according to consumers. In other words, this means that 100% of consumers have answered 4 or 5. A brand with a 200% score usually does not exist in reality.

FOUNDED BY SB INSIGHT

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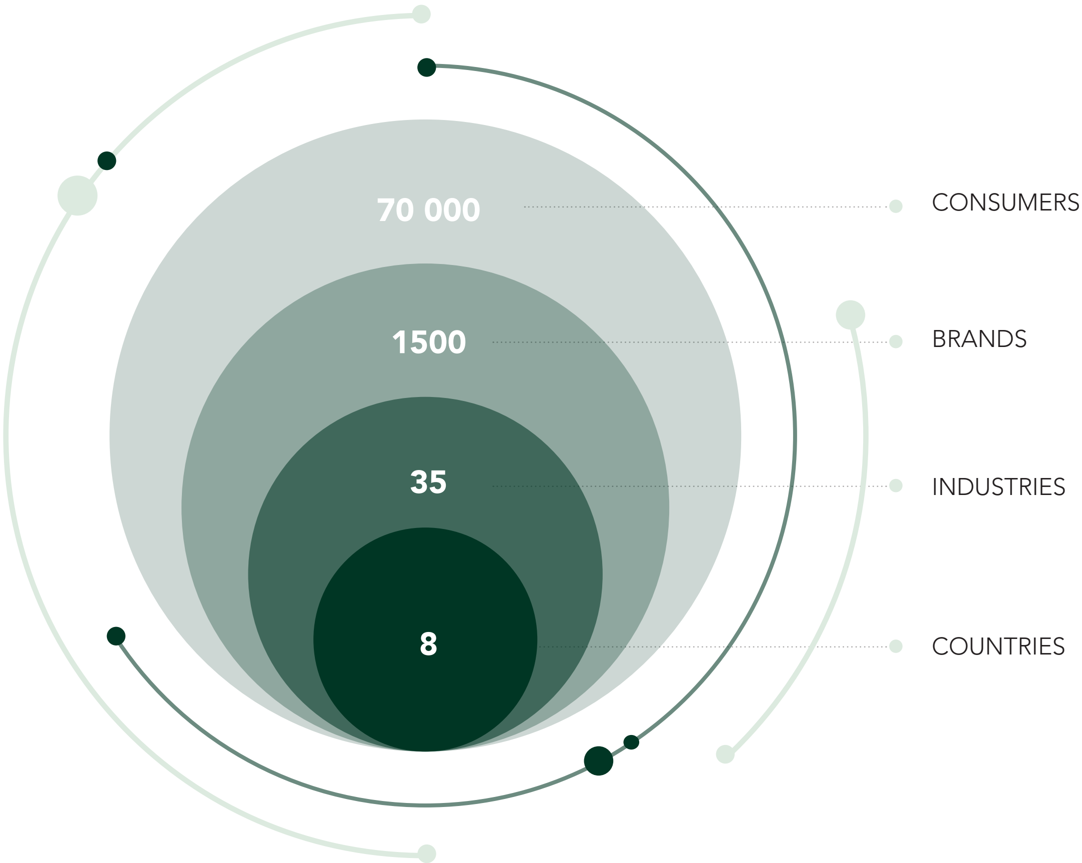
TO LEARN MORE ABOUT SB INSIGHT

CLICK HERE

Facts & figures 2022



BREAKDOWN PER COUNTRY

COUNTRIES	CONSUMERS	BRANDS	INDUSTRIES
Sweden	24 300	409	35
Norway	11 600	265	25
Denmark	9 500	233	23
Finland	9 150	214	26
The Netherlands	11 000	202	17
Estonia	900	49	8
Latvia	900	50	8
Lithuania	2 500	85	12
TOTAL	**69 850**	**1507**	**35**

Industries 2022

SWEDEN

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- Digital Services
- E-commerce
- Electricity & Heating
- Food
- Forest Owners
- Fuel
- Furniture & Decoration - Brands
- Furniture & Decoration - Stores
- Gambling & Lottery
- Governmental Institutions
- Grocery Stores
- Healthcare Providers
- Hobby & Leisure
- Home appliances & Electronics - Brands
- Home appliances & Electronics - Stores
- Hotels
- Insurance
- Opticians
- Parcels & Logistics
- Pension
- Pharmacies
- Real Estate
- Restaurants, Cafes & Take-away
- Telecommunications
- Transport
- Travel & Tourism
- Vehicle Inspection

NUMBER OF INDUSTRIES

35

NORWAY

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- E-commerce
- Electricity & Heating
- Food
- Fuel
- Furniture & Decoration
- Grocery Stores
- Hobby & Leisure
- Home appliances & Electronics - Brands
- Home appliances & Electronics - Stores
- Hotels
- Insurance & Pension
- Parcels & Logistics
- Pharmacies
- Restaurants, Cafes & Take-away
- Telecommunications
- Transport
- Travel & Tourism

NUMBER OF INDUSTRIES

25

DENMARK

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- E-commerce
- Electricity & Heating
- Food
- Fuel
- Furniture & Decoration - Stores
- Hobby & Leisure
- Home Appliances & Electronics – Brands
- Home Appliances & Electronics – Stores
- Hotels
- Insurance & Pension
- Restaurants, Cafes & Take-away
- Supermarkets
- Telecommunications
- Transport
- Travel & Tourism

NUMBER OF INDUSTRIES

23

FINLAND

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- E-commerce
- Electricity & Heating
- Food
- Fuel
- Furniture & Decoration - Brands
- Furniture & Decoration - Stores
- Grocery Stores
- Hobby & Leisure
- Home appliances & Electronics - Brands
- Home appliances & Electronics - Stores
- Hotels
- Insurance & Pension
- Parcels & Logistics
- Pharmacies
- Restaurants, Cafes & Take-away
- Telecommunications
- Transport
- Travel & Tourism

NUMBER OF INDUSTRIES

26

THE NETHERLANDS

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Digital
- E-commerce
- Energy
- Food
- Health Insurance
- Hotels
- Mobility
- Restaurants, Cafes & Take-away
- Retail
- Supermarkets
- Telecom
- Travel & Tourism

NUMBER OF INDUSTRIES

17

ESTONIA LATVIA LITHUANIA

- Agriculture*
- Banks
- Clothes & Fashion - Stores*
- E-commerce*
- Electricity & Heating
- Food & Beverage
- Fuel
- Grocery Stores
- Parcel/Delivery*
- Pharmacies
- Telecom
- Transport/Travel

* (only in Lithuania)

NUMBER OF INDUSTRIES

12

02

KEY INSIGHTS

2022

Sweden

Norway

Denmark

Finland

The Netherlands

SUSTAINABLE BRAND INDEX

IN A DATA-DRIVEN WAY, SUSTAINABLE BRAND INDEX™ IS ABLE TO IDENTIFY IMPORTANT GAPS BETWEEN HOW BRANDS THINK THEY ARE PERCEIVED AND THE REALITY.

BY ANALYSING IMPORTANT TRENDS, MAPPING STAKEHOLDER'S ATTITUDES AND BEHAVIOURS AND EVALUATING BRAND DRIVERS, THE STUDY PROVIDES IN-DEPTH INSIGHTS AND STRATEGIC TOOLS.

The calm after the storm – or not?

2021 was a year that the Covid-19 pandemic has continuously coined. Vaccines became widely available (at least in the Global North), but we also witnessed the emergence of further virus variants. With virtual meetings, home office, lockdowns, and closed restaurants a continued fact, companies and people alike have been undertaking efforts to adapt to the new normal. The pandemic has also laid bare the vulnerabilities and instability of global supply chains. The consequential shortage of raw materials has boosted inflation rates and triggered a re-localization trend, with countries now aiming to become more independent of global supply chains again. The Biden presidency sounded the bell for the return of US multilateralism; the US rejoined the Paris Climate Accord and invested heavily in green infrastructure. Milestones have been reached, for example, by addressing the phase-out of coal at COP26 and the EU taxonomy.

Nonetheless, we experience an exacerbating environmental crisis that is knocking on the door ever louder. In many places, environmental degradation and the repercussions of climate change are escalating further. Natural disasters such as flooding, droughts, and heatwaves affected many countries and people around the globe, even those that have been relatively spared before.

We also observe a trend of an unprecedently high focus on greenwashing and what is allowed to say. The sustainability communication landscape is complex and challenging. Brands face enormously demanding consumers and simultaneously meet strict oversight from authorities and consumer protection organisations. How can brands manoeuvre this situation and go beyond generic messages towards meaningful and engaging sustainability communication? The following report digs into some sustainability insights and shares our expertise on the consumer markets in the Nordics and the Netherlands. Lean back and come along on a journey through the market for sustainability in 2022.

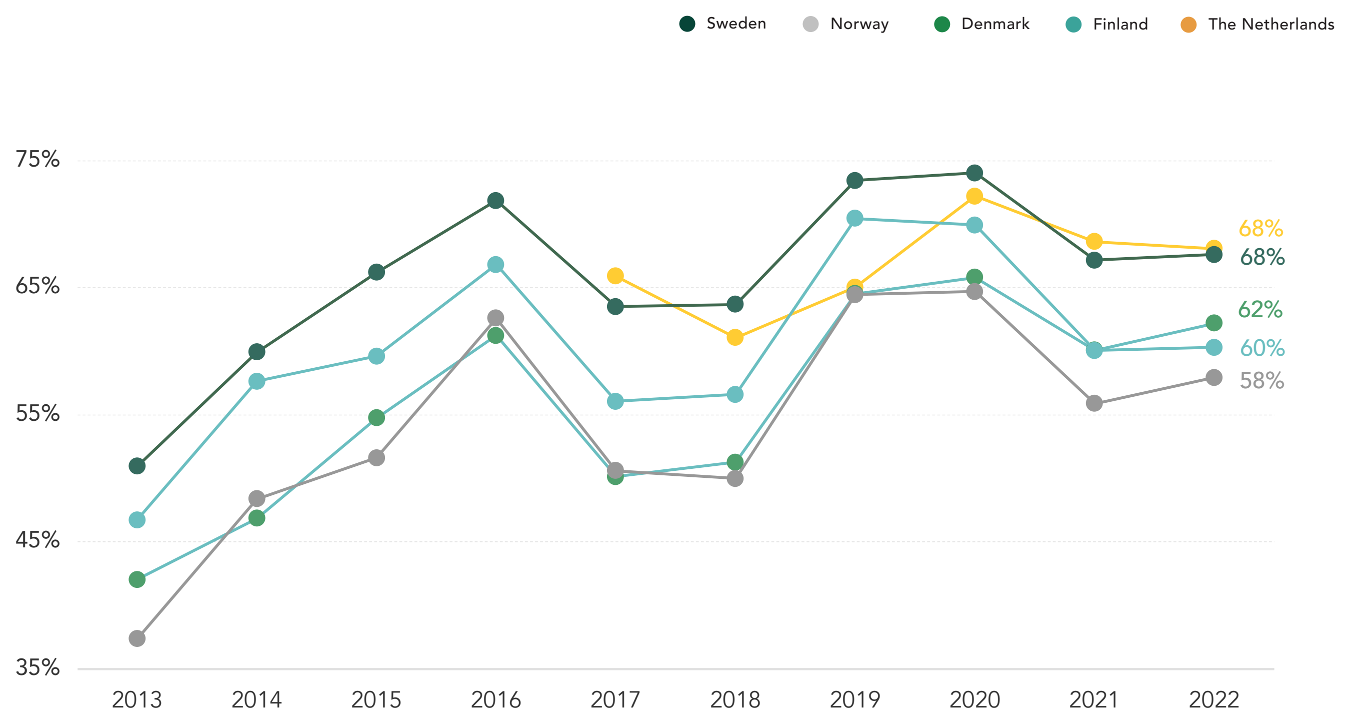
Consumer interest and engagement in sustainability stand strong

The notion of consumer interest in sustainability is multifaceted. The frequency with which consumers talk about sustainability is one element in the overall puzzle. In 2022, the majority of consumers in each country are discussing sustainability issues regularly, ranging from 68% in Sweden and the Netherlands to 58% in Norway. Thus, the level of discussions about sustainability remains essentially unchanged compared to 2021. Looking at cross-country comparisons, it becomes evident that Norwegians, Danes, and Swedes are talking slightly more about sustainability. At the same time, Dutch and Finnish consumers are a little less compared to the previous year. However, all these shifts are marginal in magnitude. Notably, Denmark overtakes Finland and now boasts the third-highest figure across all countries. Besides a steady development from 2021 to 2022, the overall trend since 2013 is increasing interest in sustainability throughout all markets.

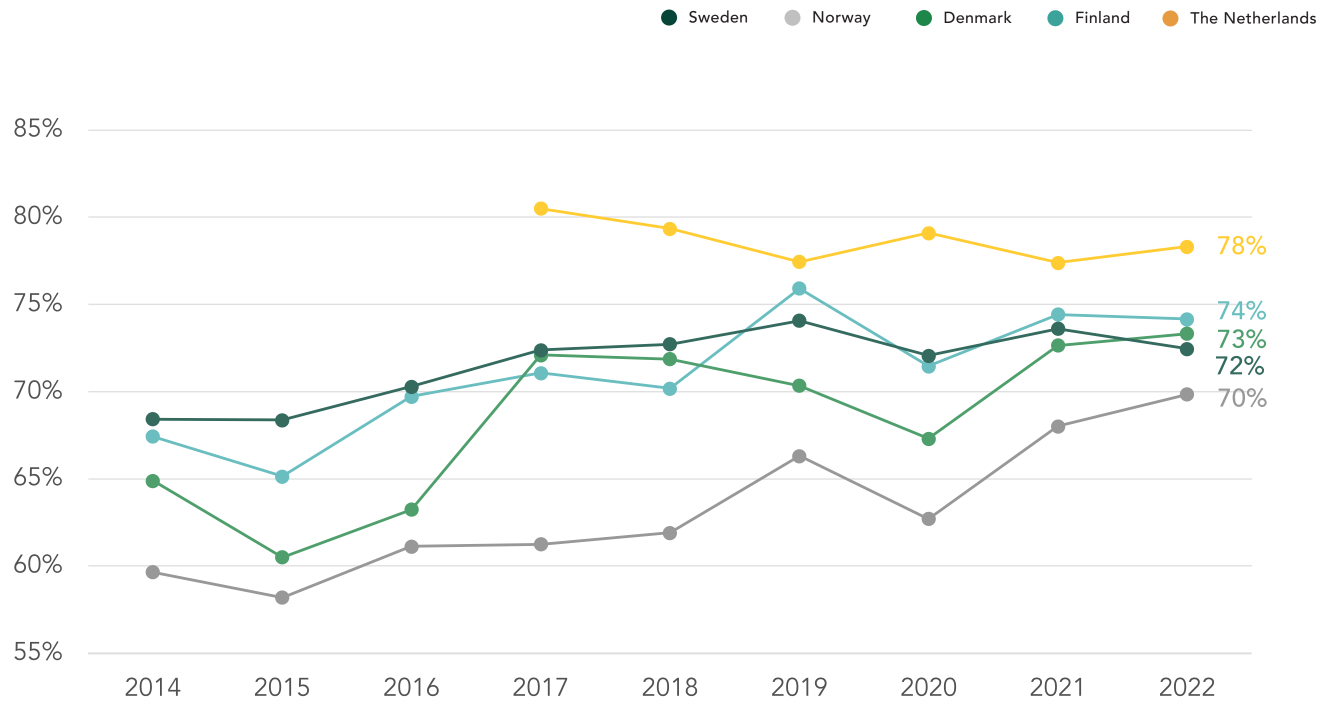
You may wonder what explains the absence of any drastic shifts from 2021 to 2022? Well, a multitude of factors played a role. The Covid-19 pandemic assured a continued focus around social issues such as conditions in and of the health sector as well as freedom and independence. Additionally, family matters, psychological health, pandemic adaptation, and the handling of the pandemic overall coined societal debates. Another factor is that the alarm reports about climate and environment of the past years coming from science have worn down the average consumer. The dominant narrative that we need to act now or it is too late paired with the reality of slow incremental progress is frustrating and energy-sapping. This leads to a certain acceptance among some consumer segments. In other words, although there is heightened media coverage about sustainability, consumers are getting used to it. Perhaps it will take further extraordinary happenings before sustainability permeates into the last corner of consumer markets.

When this is being written, we are almost two weeks into Russia´s war and invasion of Ukraine. It has already had large-scale effects around Europe and in the Nordics. Regular people feel despair and act by protesting, donating money and volunteering. These kinds of immediate crises make people act. As a consequence, social responsibility will most definitely get a higher priority going forward. At the same time, the IPCC report published at the end of February 2022 talked about climate change adaption rather than mitigation. This may lead to people feeling hopeless and refraining from behaviour change affecting the climate.

The share of respondents (%) who discuss sustainability with friends & family (sometimes + often)



The share of respondents (%) for whom sustainability affect the purchasing decision to a certain or a large extent



People still want to do the right thing

More than two-thirds of consumers state that sustainability considerations are affecting their purchasing decisions to at least a certain extent – a trend shared by all markets. Once again there are no drastic shifts in 2022 compared to 2021. The figure ranges from 78% to 70% and is highest in the Netherlands and lowest in Norway. The long-term development is relatively flat across the board. We observe a slightly positive trend over time in the Nordics, most pronounced in Norway, and a slightly decreasing trend in the Netherlands. In reality, there is, of course, a large discrepancy between what consumers say they do and what they do. Likewise, there are significant differences between those for whom sustainability matters to a large extent, to a certain extent, and not at all.

Nonetheless, it is evident that sustainability is a hot topic for most consumers and that consumers are attracted by and reward products and services which help them make sustainable choices. According to our consumer behaviour model, the share of respondents who state that sustainability does not matter for their purchasing decisions is largely congruent with consumers that we classify as "Ego" according to our consumer behaviour model. We will dig deeper into our consumer behaviour groups on the following pages.

"More than 2/3 of consumers state that sustainability considerations are affecting their purchasing decisions

Our four behaviour groups to understand sustainable behaviour better

The sustainable consumer is not one type of person and with that, it is important to understand what the different drivers of a more sustainable behaviour are. Sustainable Brand Index™ divides consumers into four different behaviour groups based on how they relate to sustainability. By looking at how consumers act in different situations and cross-tabulate this with underlying structures in their attitudes, we end up with a number of patterns. Based on these patterns, we have been able to identify four behaviours that consumers exhibit in relation to sustainability and companies. Here you will be able to find a short introduction to them:

EGO
Cares somewhat about sustainability, but without necessarily using the word sustainability.

MODERATE
Follower – believes that sustainability can be rather interesting, especially when it is trendy.

SMART
Curious & interested in sustainability, but always with a "what´s in it for me?" perspective.

DEDICATED
Passionate & well-informed on sustainability.

EGO

Ego is usually a man with strong views about how society should function, with a large focus on the individual or local level. It is the behaviour group across all countries that shows the biggest gender divergence, representing relatively more men. Ego often holds traditional values and is most interested in his personal well-being, things happening in his own country, and the local community. For some years, we have seen that Ego has been completely uninterested in sustainability, but that is changing. Ego can be reached by targeting a sustainability message carefully around the right topics. However, Ego does not want to be showered with sustainability messages. It needs to be an added (or hidden) value to more important priorities like price and health.

MODERATE

Today, Moderate is the majority of the population. Moderate is the symbol of the "ordinary consumer", one that does not make too much noise and usually has a more follower attitude. Moderate is pretty pleased with things as they are. Moderate is a bit interested in sustainability, but does not necessarily drive the agenda forward. For this behaviour group, the quality, function and price of a products is always the main prioritiy. With that, Moderate often behaves more sustainably when it is trendy or becomes normative. Even more so if it gives them positive social attention.

SMART

Smart is more actively interested in sustainability and sees the possibility to combine things that are good for him or herself with what is good for the planet. The climate issues is high up on the agenda for smart. However, quality, service and well-being are also important priorities for Smart. This means, Smart does not prioritise sustainability over everything else. They make everyday choices to balance these things, with a "what's in it for me?" perspective. Smart actively seeks information about what is going on in the world. Doing the right things and choosing sustainable brands is a matter of lifestyle for Smart.

DEDICATED

Dedicated is the behaviour group that is most interested in and knowledgeable on sustainability issues. With sustainability as a core value, Dedicated is a person who lives consciously and weighs every consumption decision carefully. They are often interested in global developments and well-informed about what companies do in the area of sustainability. However, Dedicated also puts very high demands on companies and is not afraid to be vocal with questions or comments on their sustainability efforts. Usually she or he reads and researches a lot and avoids accepting information directly from companies themselves. Across countries, Dedicated is often younger in age and living in urban areas.

Our behaviour groups - 2022 trends

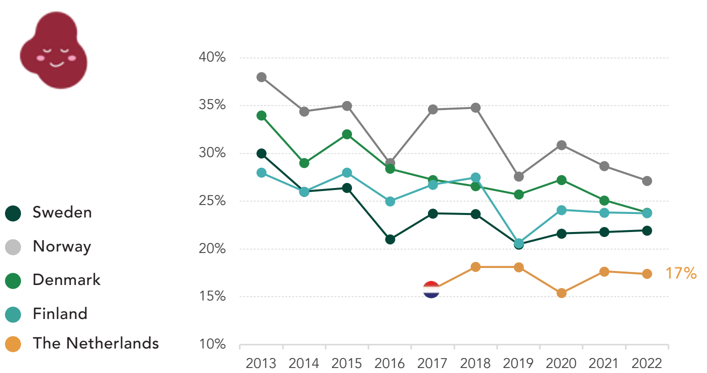
Now that you have gained an understanding of our consumer behaviour groups, it is time to dive into some insights and characteristics of each market.

Over the following two pages to the right, you can see four diagrams, each representing one of the four behaviour groups (Ego, Moderate, Smart, and Dedicated) and their size's development over time in the respective countries.

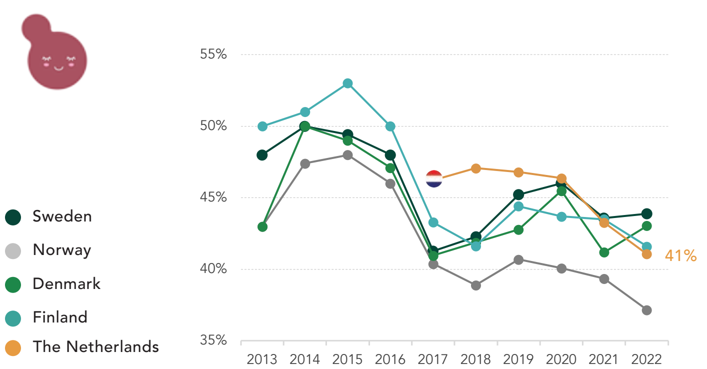
Starting by looking at Ego, we observe a long-term decreasing trend in the Nordic countries. The share of consumers exhibiting behaviour patterns in line with Ego is shrinking. Compared to ten years ago, the size of Ego is calibrating at levels about 5-10% lower today, depending on the country. The Netherlands has exhibited a very stable development of Ego since 2017, even showing slightly higher levels today than was the case five years ago. While the overall decreasing trend continues from 2021 to 2022 in Norway and Denmark, levels stabilise in the other countries during the same interval. Overall, the proportion of Ego is below 30% in all markets, varying from 27% in Norway to 17% in the Netherlands.

Moderate is showing a similar trend as Ego in the sense that it has been shrinking in size over time since 2013. However, the decline is smaller in magnitude, with an average of around five throughout all markets. Looking at the development from 2021 to 2022, the overall decreasing trend continues in Norway, Finland, and the Netherlands, while Moderate is stable in Sweden and Denmark. Moderate is the largest of all behaviour groups consisting of around 40% of the total population, with the highest share in Sweden (44%) and the lowest in Norway (37%).

EGO



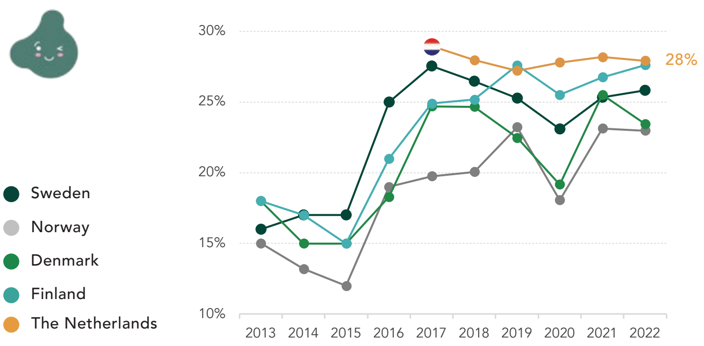
MODERATE



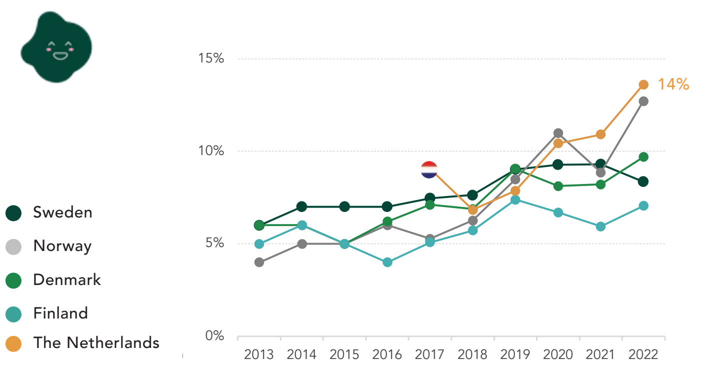
Turning to Smart, we can state that this behaviour group has increased significantly in size since 2013 in the Nordics. Nowadays, Smart consists of about 10% more consumers than ten years ago (overall level 23-28%). In the Netherlands, the development since 2017 is relatively stable with ups and downs along the way, nonetheless featuring the highest share (28%) of consumers belonging to Smart's behaviour patterns. Through the last year, changes have been marginal in all markets except Denmark, where we can see a slight decline.

Last but not least, let us focus on Dedicated. This behaviour group shows a positive development over time as well. However, the increasing trend is much smaller in magnitude compared to Smart. On average, today's level lies around 4% above that of 2013, ranging from 7% in Finland to 14% in the Netherlands. Dedicated is also the behaviour group for which we observe the most drastic shift from 2021 to 2022. All markets boast comparatively significant increases in size, with the only exception being Sweden, which shows a decline in the number of consumers behaving in line with Dedicated.

SMART



DEDICATED



> *We can see that there is a transfer underway. Markets are becoming more Dedicated and Smart and less Moderate and Ego*

Let us summarise some key findings. At large, we can see that there is a transfer underway. Markets are becoming more Dedicated and Smart and less Moderate and Ego. This transfer is mainly happening one way. Some consumers from Ego are moving to Moderate and others from Moderate to Smart, some from Smart to Dedicated. The magnitudes of these shifts are diverse, resulting in developments we are observing.

Furthermore, Norway exhibits the highest share of Ego and the second-highest of Dedicated consumers amongst all markets. Hence, one can state that the Norwegian market is more polarised than the other markets. Opposite to that, Swedish consumers are more aggregated around the groups in the middle. Moderate and Smart make up a combined 70% market share. The Dutch market may be deemed the most progressive of all, given that the combined market share of Dedicated and Smart is highest here, totaling 42%.

The take-home message is that while these groups are not set in stone, they tend to be somewhat robust over time, and while both Ego and Moderate are slowly decreasing, Smart and Dedicated are increasing in size.

Consumers are not merely guided by their underlying convictions, values, and attitudes. The particular context of a situation is also decisive for consumption choices

Adressing the sustainable consumer

The sustainable consumer is elusive. We have learned that a quest for the "one" sustainable consumer would be a waste of time. Instead, consumers exhibit significantly different approaches and conceptions regarding sustainability – from no interest whatsoever to it being the single most important factor and anything in between. This means that a one size fits all approach to sustainability communication is doomed to fail for brands.

In addition, we advise not to get a wrong impression by concluding that all consumers belonging to a particular group exhibit identical behaviour patterns. The groups themselves are heterogeneous and could be further subdivided to take account of all their nuances. The spectrums in each behaviour group vary substantially, and movements within and between groups are a fact. Nonetheless, consumers within the same behaviour group are guided by similar principles, making them more likely to behave in a certain way around sustainability issues.

Consumers are not merely guided by their underlying convictions, values, and attitudes. The particular context of a situation is also decisive for consumption choices.

Consumers frequently showcase a high degree of flexibility and adaptability and are at least as irrational as rational. Hence, there is variation in consumption patterns around a baseline of "atomic" habits, which is informed by consumers' convictions, values, and attitudes.

The above is something to bear in mind when deciding on a sustainability strategy and addressing consumers with sustainability messages. If brands aspire to sustainability communication that is relevant, meaningful, and not least successful, it must be adaptive and tailored-made. This requires data-driven insights and in-depth knowledge about the sustainable consumer in your specific market and industry.

We can help you identify the sustainable consumer in your industry, their preferences, and your brand perception, enabling you to focus on the most relevant and promising areas for your sustainability strategy and communication. Make sure to strike the right note to get your message across.

We must go from quantity to quality

If it has not already become apparent by now, we spell it out again: sustainability communication must go from quantity to quality. Until recently, the major challenge for brands was daring to talk about sustainability. Many were hesitant because they were scared to fail. Thankfully, this stage has passed (for most). Now everyone is talking sustainability. And it is great that many have come to understand the importance of communicating around sustainability issues. However, this leads to at least two major challenges.

First and foremost, since there is much more stuff out there, it is also becoming increasingly difficult to get your brand's message across and stand out of the crowd, especially if you rely on the generic usage of sustainability buzzwords which out of context become bland and meaningless to consumers.

Beyond that, most sustainability communication is unfortunately relatively poor. This is also why many consumers are sceptical about the credibility of brands' sustainability communication, as we will learn on the following pages. Much of it is too generic, boring, and incomprehensible, sometimes outright misleading, coming dangerously close to greenwashing.

Secondly, and consequently, brands must dare to invest in more quality. Focusing on the creation of creative, original, and authentic communication combining sustainability's complexity with an engaging and meaningful narrative will pay off. Brands must find a reasonable and intelligent mélange of fact-based vs narrative-based communication and a balance of simplicity and complexity in their strategy—no easy task. There is no blueprint of how to accomplish that. Instead, the exact composition of the above crucially depends on the type of message you want to get across, whom you are addressing, and your brand's unique sustainability challenges.

It is high time now to leap forward regarding the quality of sustainability communication by brands.

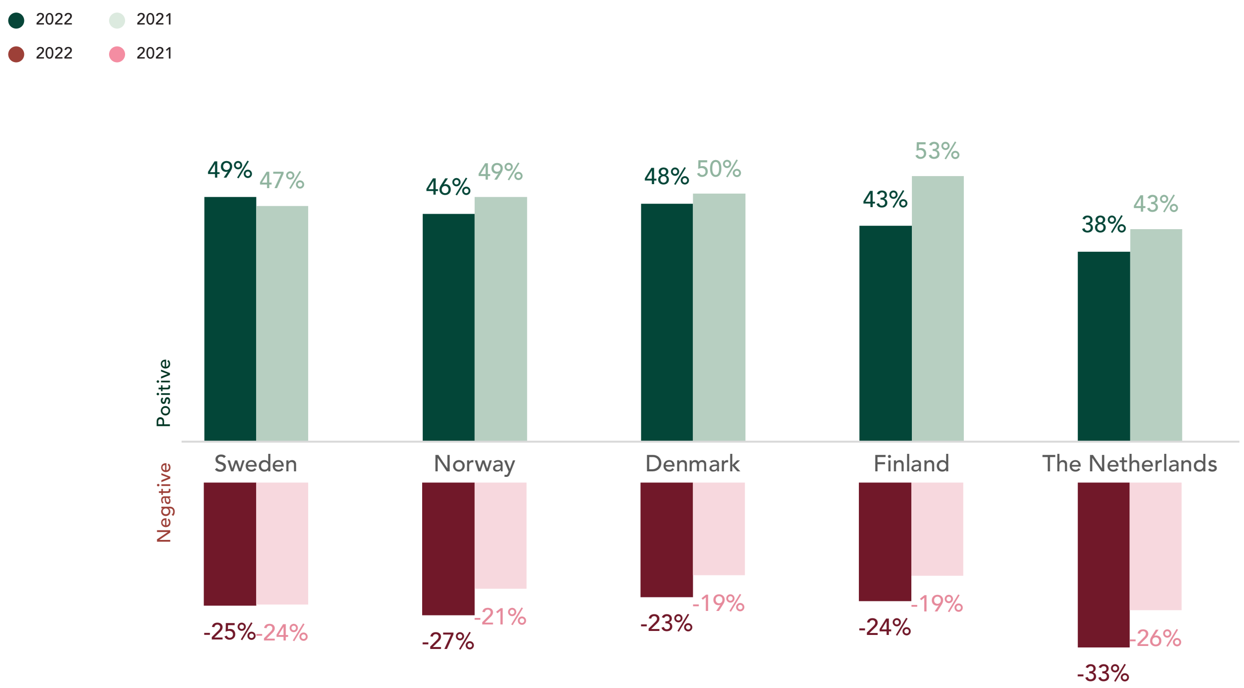
Attitudes to sustainability communication vary

Let us now take a closer look at consumers' attitudes towards sustainability communication by brands. At first sight, it becomes evident that the share of consumers who are positive towards sustainability communication outweighs the percentage of those who are negative. On average, around 45% of consumers are positive, ranging from 38% in the Netherlands to 49% in Sweden. While this is encouraging, last year's trend, that all markets but Sweden saw the share of positives decline, is concerning. Especially in the Finnish and Dutch markets, sympathy towards sustainability communication plummeted by 10 and 5 percentage points, respectively. The further substantiating concern is that the share of consumers with a negative attitude towards sustainability communication is rising – a trend common to all markets. Disapproval of sustainability communication is highest in the Netherlands (33%) and lowest in Denmark (23%), but generally a widespread phenomenon with between a quarter and one-third of consumers being negative.

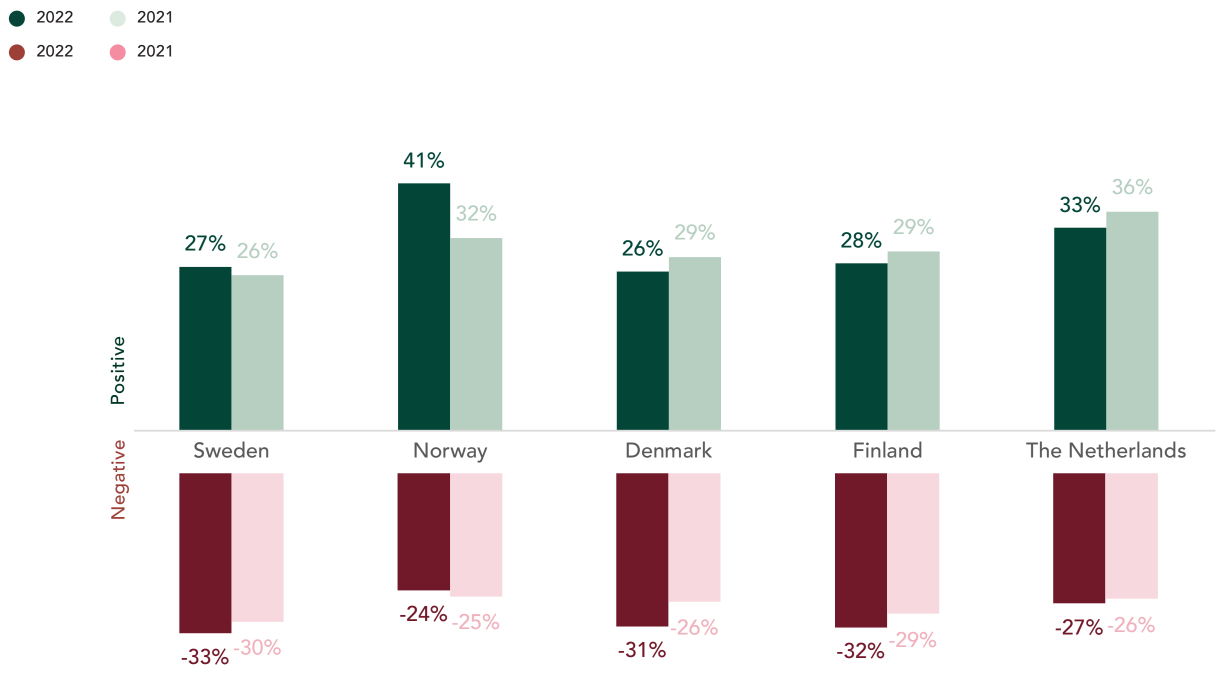
> *We need better, higher quality sustainability communication*

Seeing the attitude towards sustainability communication as an indicator of its quality, one can conclude that testimony of successful sustainability communication looks differently. A glimmer of hope is that the net attitude towards sustainability communication is still positive in all markets. Nonetheless, the trend is continuously declining, and the margins are getting smaller. And let us not forget about the 25% of "undecided" consumers who are neither positive nor negative or do not have an opinion. The conclusion: we need better, higher quality sustainability communication. This is especially true if building a lasting sustainable brand identity is the objective. It may even win you the undecided.

Share of consumers (%) who are positive/negative towards sustainability communication



Share of consumers (%) who trust/mistrust sustainability communication



The (lack of) credibility in sustainability communication needs to be addressed

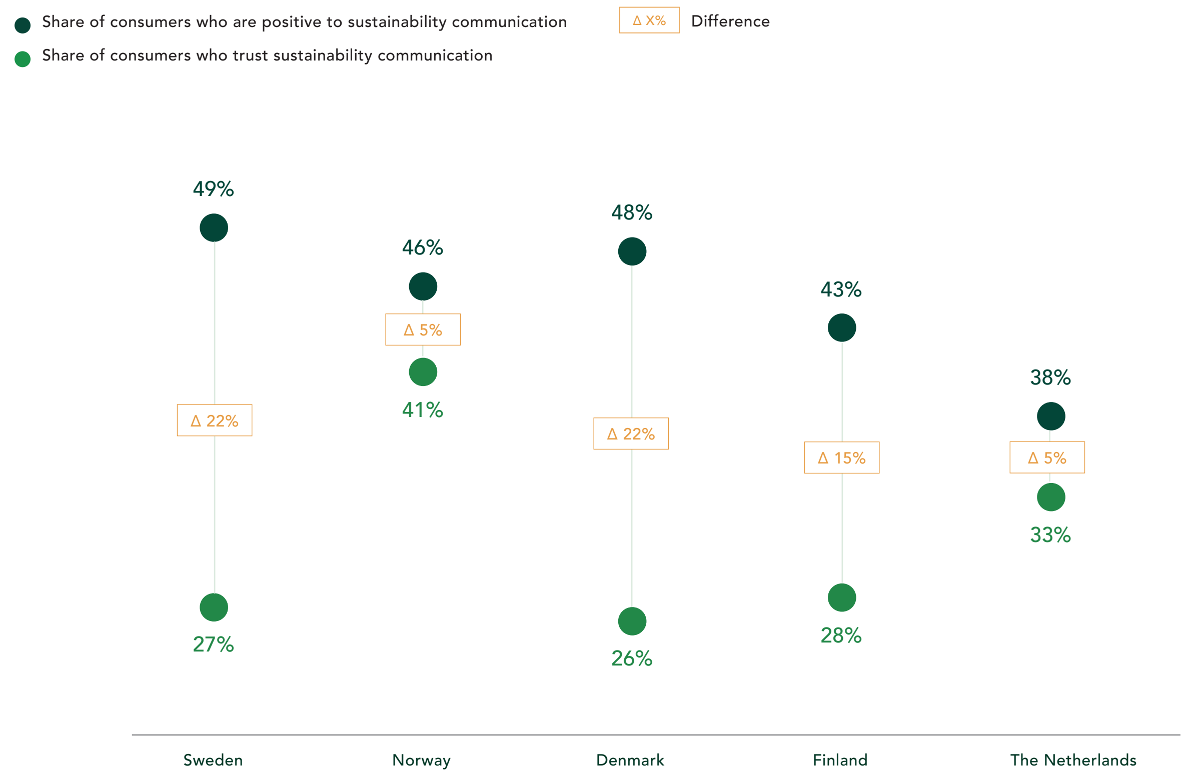
Now we will consider a factor that is at least as important as attitude towards sustainability communication - its credibility. How trustworthy are sustainability messages by brands perceived to be from the consumers' perspective? We have answers, and the overall picture is not looking too great. The trend of trust in and credibility of sustainability communication is declining or neutral depending on the market. Additionally, mistrust continues to rise in most markets. A remarkable exception is the Norwegian market which evolves against this trend and where both trust increases and mistrust decreases. Levels of trust range from 26% in Denmark to 41% in Norway, whereas levels of mistrust are between 24% (Norway) and 33% (Sweden). In Sweden, Denmark, and Finland, the perceived net credibility is negative, indicating that more consumers mistrust sustainability communication than trust it. The conclusion is that sustainability communication still leaves a lot to be desired in terms of its credibility. Much communication is too generic, often a result of a perceived need to communicate something about sustainability on the side of brands. Unfortunately, this pressure to be part of the debate not seldomly leads to poor quality, contributing to the notion of mistrusted sustainability communication as discussed above. Indeed, it is not easy to find the balance between conveying a meaningful message accounting for the inherent complexities of sustainability on the one side and a concise and comprehendible one that consumers understand on the other. Our data-driven insights can help you address your relevant stakeholders in a meaningful way. Once again, a third of consumers have not made up their minds and remain to be convinced – hopefully for the better.

Comparing attitude and credibility of sustainability communication

Now that we have reviewed both attitude and credibility of brands' sustainability communication as perceived by consumers, it is time to consider the gap between the two. The graph below visualises this gap. What becomes clear directly is that levels of trust in sustainability communication fall short of the generally positive attitude towards it. This is, as mentioned before, a sign of lacking quality. This is true for all markets, but the gap between attitude and credibility is especially pronounced in Sweden and Denmark. Finland also exhibits a considerable gap, while Norway and the Netherlands are much closer to parity. Hence, brands operating in the Swedish, Danish, and Finnish markets must persuade consumers the most regarding the efficacy of their sustainability work. Norwegians are generally more positive of efforts coming from brands to tackle societal issues. They are more willing to honour brands that do not merely care about the maximisation of their profits but also contribute to a higher good. In a sense, the bar is set higher for brands in the Swedish, Danish and Finnish markets.

What becomes clear is that levels of trust in sustainability communication fall short of the generally positive attitude towards it

The gap between attitude and trust



What is the point of a study that "only" looks at sustainability perception?

There are many, but let us look at two important ones. We start with the communicative aspect: winners in the ranking can communicate that they are perceived to be the best. This is a hot potato right now. We can see that the competitive element of Sustainable Brand Index is very engaging. To be concrete, the ranking and the communication around it has historically contributed to the following:

- Increased interest in sustainability from the management and board of both the winning companies and those further down the rankings.
- Improved cooperation between the sustainability department and communications and marketing to avoid greenwashing.

For these reasons, we think the communication around the ranking is positive.

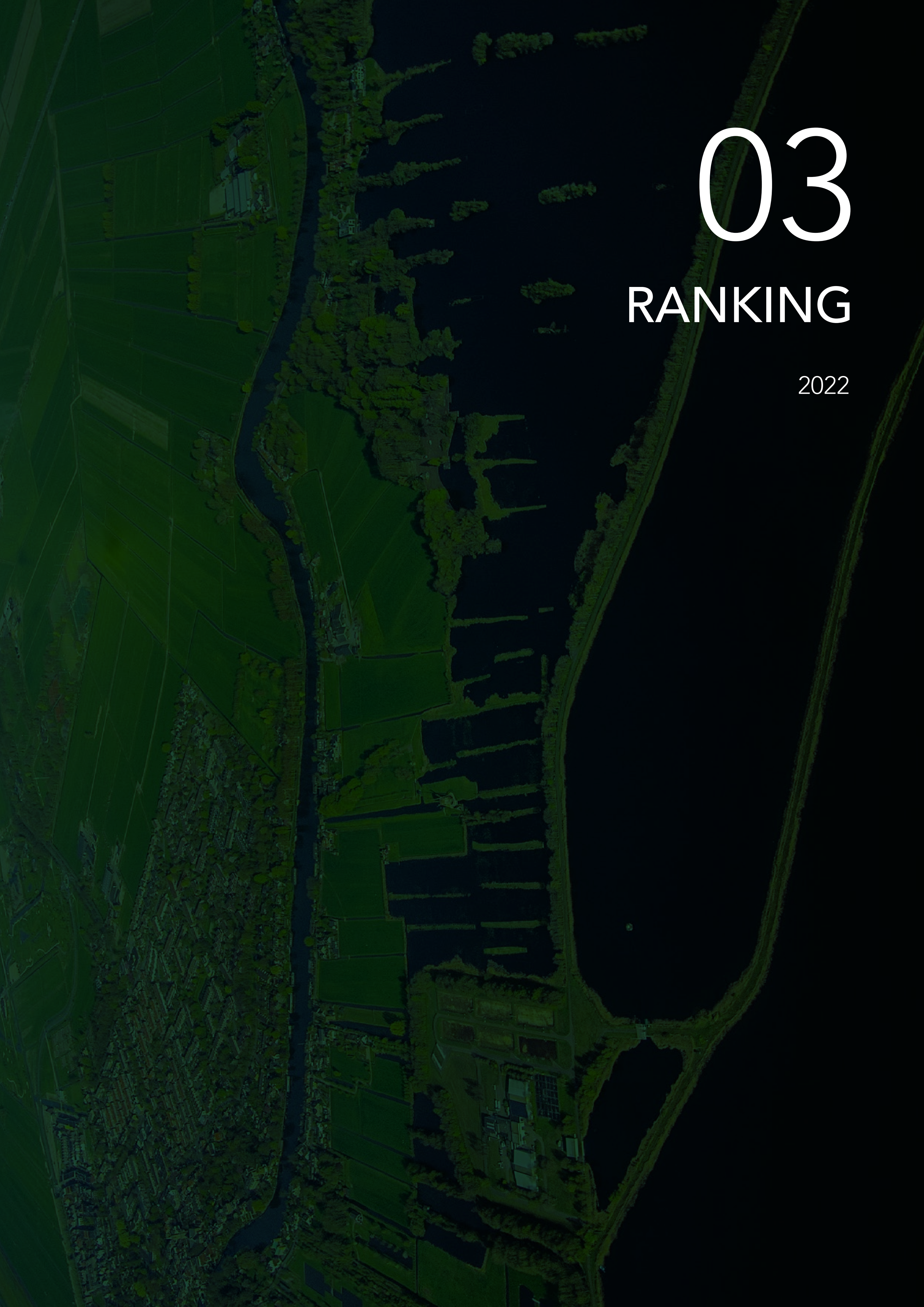
Furthermore, there is the aspect that we provide insights to companies on the lists. These insights are used to drive change and create engagement internally and externally. Let us give some concrete examples of what this has contributed to:

- As a direct consequence of our insights, a large international company set up a whole sustainability department. The aim was to better respond to why the company was perceived as sustainable and deliver on consumer demands.
- As a result of our tailored recommendations, one company initiated the process of setting Science-Based Targets and has just had its targets approved.

In short, it is possible to create change and build a brand simultaneously.

Want to know more?

CONTACT US



03
RANKING

2022

THE DUTCH RANKING 2022

INDUSTRIES MEASURED IN THE NETHERLANDS

- Airlines
- Automotive
- Banks
- Beverage
- Consumer Goods Corporations
- Digital
- E-commerce
- Energy
- Food
- Hotels
- Insurance
- Mobility
- Restaurants, Cafes & Take-away
- Retail
- Supermarkets
- Telecom
- Travel & Tourism

TOTAL AMOUNT OF INDUSTRIES MEASURED IN THE NETHERLANDS

17

TOTAL AMOUNT OF BRANDS MEASURED IN THE NETHERLANDS

202

THE RANKING SCORE

The ranking of Sustainable Brand Index™ shows how brands are perceived on sustainability according to consumers. Ranking scores are based on two main parts; environmental responsibility and social responsibility. The maximum score in each area is 100%, making the total ranking score of brands between 0-200%. Within each area, we first of all measure consumer awareness levels around the responsibility of a brand (Sustainable Brand Awareness - SBA). Secondly, we measure consumer attitudes towards the responsibility of a brand (Sustainable Brand Quality - SBQ. The final score of each brand is based on the percentage of consumers who assess a company's sustainability efforts as good (4) or very good (5) on a scale of 1-5 + "don't know".

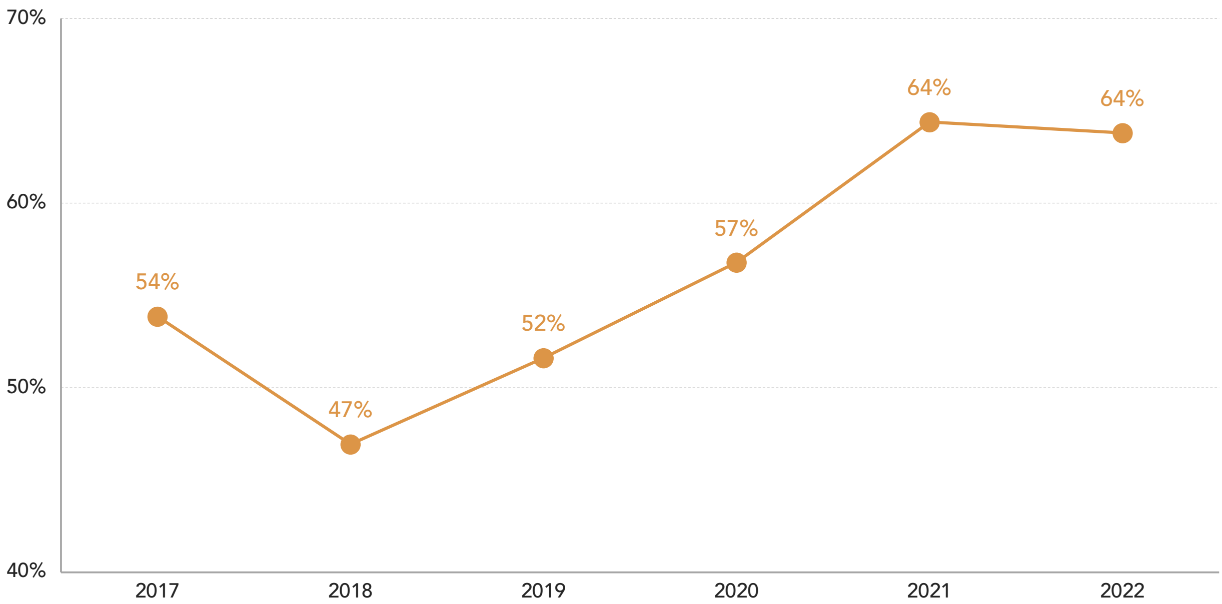
DEFINITION OF SUSTAINABILITY

The definition of environmental and social responsibility The basis for the ranking in Sustainable Brand Index™ is the UN Global Goals for Sustainable Development (SDGs). The evaluation is done on an overarching level with the goals as a basis for the definition. Each goal is categorised according to the area (environment or social) in which it belongs.

TARGET GROUP & BRAND SELECTION

The target audience in Sustainable Brand Index™ B2C is the general public, 16-75 years, in each country. Brands are selected yearly across a variety of industries, based on a set of independent parameters. Parameters include: market share on the respective market, turnover and general brand awareness. The purpose of these criteria is to create a selection that mirrors the brands that consumers meet in their everyday life. Brands cannot choose to be included or excluded from the study. Every brand is evaluated by at least 1 000 respondents who are familiar with the brand.

The average Dutch ranking score



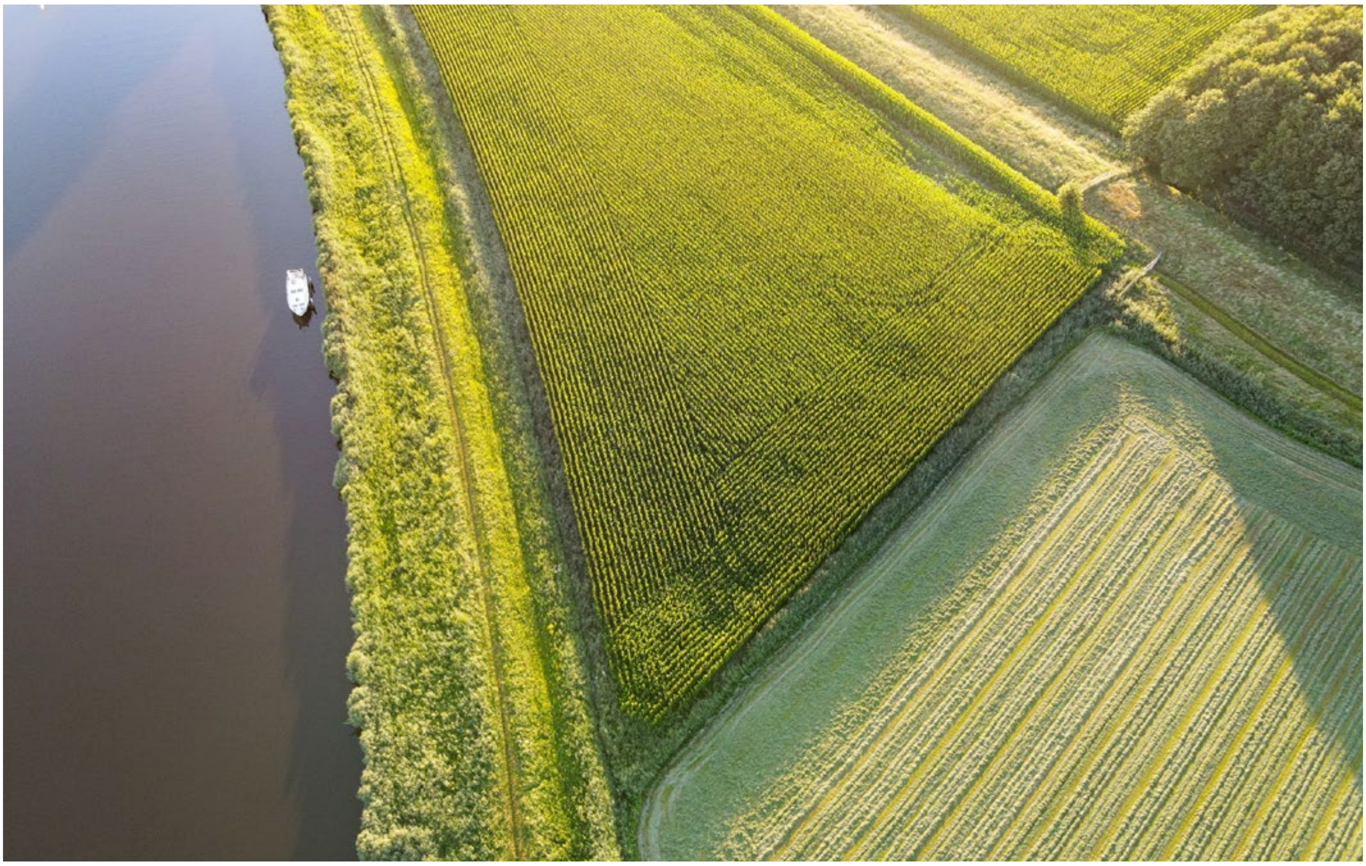
A reflection on the Dutch market for sustainability by Annemarije Tillema.

Country Manager of Sustainable Brand Index™ in The Netherlands

The Dutch Ranking 2022.

In 2022 we see a neutral development of the average ranking score of Sustainable Brand Index™ in the Netherlands. In fact, the figure remains virtually unchanged at 64% (there is a marginal difference in decimals). This also means that the significant increase (+7%) from the previous year and the overall positive trend since 2018 (+17%) are stopped for now.

What are the reasons for this year's break in the trend? Informed by six years of data three indicators come to mind when seeking to explain changes in ranking score trends. Spoiler, this year we observe that all three of the metrics show a stagnant or negative development. The first one to consider is consumer interest in sustainability measured as the level of conversations about sustainability. As we have already seen, the development is stagnant this year with a slightly negative tendency (-1% compared to 2021). Secondly, consumers' brand awareness and attitude towards environmental and social responsibility by brands is a relevant factor. Until recently, both indicators showed a simultaneous upward trend partly responsible for the continued positive development of the past years. While brand awareness continues to increase this year, we observe a dip in the consumers' attitude towards brands' environmental and social responsibility taking. Last but not least attitude and trust in sustainability communication by brands are important factors. Here we observe a negative trend too. The share of consumers who have a negative attitude increases significantly at the same time as the share of positives is shrinking. In 2021, the share of positives outweighed



the negatives by 17%, this year the figure is down to merely 5%. In addition, levels of trust in sustainability communication are also in decline in the Netherlands. This is a concerning development and implies a need to focus on the quality of sustainability communication.

The Netherlands (64%) ranks second only behind Norway (67%) in comparison to the Nordic markets when it comes to the average ranking score in Sustainable Brand Index™. They also belong to the "top tier" markets (together with Norway and Finland) and hence are ahead of both Sweden (43%) and Denmark (41%) by a considerable margin. An average score of 64% also means that the market still has a long way to go before being perceived as sustainable (maximum ranking score is 200%). This can be seen in the context of this year's winner in Sustainable Brand Index™, De Vegetarische Slager, which has a score of 111%, while the bottom brand, Ryanair, only managed to score 35%. Just as we see discrepancies between brands, we also see significant differences in how industries are perceived. Supermarkets, and Mobility are at the top when we look at industry rankings, while Restaurants, Cafes & Take-away, and Airlines are the industries where brands are perceived to take the least responsibility for people, the environment, and society.

In conclusion, we can say that the perception of brands' sustainability engagement in the Dutch market has flattened this year bringing a halt to the positive development of the past years. More than ever, there is a strong need for higher quality sustainability communication by brands.

> **More than ever, there is a strong need for higher quality sustainability communication by brands**

TOP 10

01 De Vegetarische Slager

02 Tony's Chocolonely

03 Greenchoice

04 Zonnatura

05 ANWB

06 NS

07 Valess

08 Alpro

09 IKEA

10 Albert Heijn

OFFICIAL RANKING 2022

NETHERLANDS

1. **De Vegetarische Slager**
2. Tony's Chocolonely
3. Greenchoice
4. Zonnatura
5. ANWB
6. NS
7. Valess
8. Alpro
9. IKEA
10. Albert Heijn
11. Tesla
12. HAK
13. The Body Shop
14. Campina
15. Vattenfall
16. Essent
17. ASN Bank
18. Lidl
19. Vandebron
20. Vivera
21. Bar-le-Duc
22. Arla
23. Beemster kaas
24. Jumbo
25. Spa
26. Melkunie
27. Triodos Bank
28. Eneco
29. Optimel
30. HEMA
31. Pickwick
32. Becel Pro Activ
33. ANWB Reizen
34. bol.com
35. PLUS
36. Garden Gourmet
37. Coolblue
38. Becel
39. Philips
40. Landal GreenParks
41. Activia
42. Oatly
43. Rituals
44. Etos
45. Rabobank
46. Chaudfontaine
47. Campina Botergoud
48. Milner
49. Maaslander
50. CoolBest
51. Bolletje
52. innocent
53. CZ
54. Center Parks
55. Douwe Egberts
56. Appelsientje
57. Aviko
58. Kruidvat
59. SNS Bank
60. Van der Valk
61. Almhof
62. energiedirect.nl
63. Connexxion
64. Arriva
65. Coop
66. Sourcy
67. Iglo
68. Sanex
69. Blue Band
70. KPN
71. NIVEA
72. Verkade
73. Auping
74. ENGIE
75. ING
76. Toyota
77. a.s.r.
78. Dove
79. Bertolli
80. VGZ
81. Honig
82. La Place
83. Siemens
84. Blokker
85. Karwei
86. C&A
87. Achmea
88. Dirk
89. Google
90. Menzis
91. GAMMA
92. Chocomel
93. H&M
94. Volvo
95. Bonduelle
96. ALDI
97. Roompot Vakanties
98. Lipton Ice Tea
99. Grand'Italia
100. Praxis
101. Nespresso
102. Dr. Oetker
103. Nike
104. Knab
105. Côte d'Or
106. NESCAFÉ
107. Zeeman
108. Heinz
109. Milka
110. Microsoft
111. Calvé
112. Old Amsterdam
113. SPAR
114. Knorr
115. Danio
116. Kanis & Gunnink
117. Unox
118. MAGGI
119. Croma
120. Heineken
121. Palmolive
122. Starbucks
123. Mora
124. ŠKODA
125. De Ruijter
126. Volkswagen
127. Verstegen
128. Lindt
129. wehkamp
130. Nestlé Chocolade
131. NH Hotel Group
132. ABN AMRO
133. Grolsch
134. Zalando
135. NLE (Nederlandse Energie Maatschappij)
136. Bona
137. Alliander
138. Action
139. Xenos
140. Apple
141. Coca-Cola
142. Mercure
143. Subway
144. T-Mobile
145. NESCAFÉ Dolce Gusto
146. Beter Bed
147. Oxxio
148. Kia
149. McDonald's
150. Mercedes-Benz
151. Vodafone
152. Opel
153. BMW
154. De Bijenkorf
155. Leen Bakker
156. Kwantum
157. WE Fashion
158. Bavaria
159. Renault
160. Novotel
161. Amstel
162. Andrélon
163. Peugeot
164. Sunweb
165. Fletcher Hotels
166. Booking.com
167. Mars
168. Ola
169. JYSK
170. Airbnb
171. MediaMarkt
172. TUI
173. Fanta
174. KITKAT
175. Schiphol
176. M&M's
177. Sprite
178. FEBO
179. Shell
180. ZARA
181. Oad
182. Toblerone
183. Ford
184. Goossens
185. KLM
186. Corendon
187. Uber
188. Axe
189. Transavia
190. Tele2
191. Esso
192. KFC
193. Pepsi
194. ibis
195. BURGER KING
196. Total
197. Amazon
198. Primark
199. BP
200. Trendhopper
201. easyJet
202. Ryanair

= Industry winner

ABOUT THE RANKING IN SUSTAINABLE BRAND INDEX™

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The 10 brands climbing the most

Number of positions	Brand
+48	Aviko
+48	Grand'Italia
+44	ŠKODA
+40	CoolBest
+35	Roompot Vakanties
+29	H&M
+27	wehkamp
+26	Dr. Oetker
+25	Essent
+25	Blokker

The 10 brands dropping the most

Number of positions	Brand
-46	MediaMarkt
-44	Nestlé Chocolade
-44	CocaCola
-40	Apple
-39	Fletcher Hotels
-38	Pepsi
-36	Calvé
-36	Schiphol
-35	Fanta
-35	Ford

THE NETHERLANDS' MOST SUSTAINABLE BRAND 2017 - 2022

This is the brand that is perceived as the most sustainable brand according to Dutch consumers in Sustainable Brand Index™ over time.

2022

2021

2020

2019

2018

2017

RANKING DEVELOPMENT 2017-2022

ABOUT THE RANKING

The ranking of Sustainable Brand Index™ shows how brands are perceived on sustainability according to consumers. Ranking scores are based on two main parts; environmental responsibility and social responsibility. The maximum score in each area is 100%, making the total ranking score of brands between 0-200%. Within each area, we first of all measure consumer awareness levels around the responsibility of a brand (Sustainable Brand Awareness - SBA). Secondly, we measure consumer attitudes towards the responsibility of a brand (Sustainable Brand Quality - SBQ). The final score of each brand is based on the percentage of consumers who assess a company's sustainability efforts as good (4) or very good (5) on a scale of 1-5 + "don't know".

In reality, the **maximum ranking score of 200%** (which would basically means a perfect score) is still far out of reach for all brands on the market. To clarify the 2021 ranking position of each brand included in Sustainable Brand Index™, a scale of all ranking scores have been provided in the overview below.

SCORES

- 100-120%
- 81-100%
- 61-80%
- 41-60%
- 21-40%
- 0-20%

2022 Score	Brand	2022	2021	2020	2019	2018	2017
111%	De Vegetarische Slager	1	2				
100-120%	Tony's Chocolonely	2	1	1	1	1	
	Greenchoice	3	3	2	2	3	1
	Zonnatura	4	5	7	3	4	3
	ANWB	5	4	3	5	6	
81-100%	NS	6	8	6	6	10	
	Valess	7	25				
	Alpro	8	14	21	12		
	IKEA	9	6	5	7	5	2
	Albert Heijn	10	13	15	11	9	9
	Tesla	11	17	4	4	2	
	HAK	12	21				
	The Body Shop	13	16	20	13	13	12
	Campina	14	12	12	10	11	7
	Vattenfall	15	11	8	46	22	16
	Essent	16	41	30	28	30	17
	ASN Bank	17	9	17	14	12	11
	Lidl	18	26	28	19	20	22
	Vandebron	19	7	9	21	7	27
	Vivera	20	29				
	BarleDuc	21	32				
	Arla	22	23	31	15	21	20
	Beemster kaas	23	36	25	42		
	Jumbo	24	20	27	25	23	23
	Spa	25	15				
	Melkunie	26	19	19	23		
	Triodos Bank	27	18	24	20	14	6
61-80%	Eneco	28	10	13	9	16	8
	Optimel	29	44	33	29	39	42
	HEMA	30	22	11	26	19	10
	Pickwick	31	39	22	30	15	14
	Becel Pro Activ	32	24	16	17		
	ANWB Reizen	33					
	bol.com	34	30	26	36	31	44
	PLUS	35	33	32	41	34	29
	Garden Gourmet	36	53				
	Coolblue	37	49	37	49	38	74

RANKING DEVELOPMENT 2017-2022

2022 Score

61-80%

	2022	2021	2020	2019	2018	2017
Becel	38	34	23	16		
Philips	39	27	18	8	8	4
Landal GreenParks	40	43	10	18	25	
Activia	41	55	36	48	46	32
Oatly	42	37	63	37		
Rituals	43	35	34	31	18	15
Etos	44	56	58	61	73	75
Rabobank	45	40	14	22	17	13
Chaudfontaine	46	31				
Campina Botergoud	47	50	45	33		
Milner	48	46	35	60	62	28
Maaslander	49	51	47	47	33	18
CoolBest	50	90	62	65	29	45
Bolletje	51	28	38	53	53	37
innocent	52					
CZ	53	62	72	84		
Center Parks	54	61	41	58	41	
Douwe Egberts	55	47	29	27	27	19
Appelsientje	56	57	54	59	48	40
Aviko	57	105	84			
Kruidvat	58	65	42	66	69	65
SNS Bank	59	77	61	51	57	59
Van der Valk	60	81	60	64	64	
Almhof	61	42	43	40	26	33
energiedirect.nl	62	67	49	32	28	21
Connexxion	63	45	39	34	47	
Arriva	64	59	50	24	56	
Coop	65	70	70	68	68	79
Sourcy	66	52				
Iglo	67	79	79			
Sanex	68					
Blue Band	69	38	71	56		
KPN	70	60	51			
NIVEA	71					
Verkade	72	48	53	91	60	31
Auping	73					
ENGIE	74	58	48	50	42	55
ING	75	85	56	39	86	30
Toyota	76	54	40	44	44	
a.s.r.	77					
Dove	78					
Bertolli	79	71	86	80	81	
VGZ	80	63	64	62		
Honig	81	91	108	79	55	62
La Place	82	72	44	38	32	25
Siemens	83	64				
Blokker	84	109	111	124	102	69
Karwei	85	102	94	76	87	48
C&A	86	94	57	63	63	53

RANKING DEVELOPMENT 2017-2022

2022 Score	Brand	2022	2021	2020	2019	2018	2017
	Achmea	87	88	67	107		
	Dirk	88	107	100	102	89	77
	Google	89	66				
	Menzis	90	73	46	35		
	GAMMA	91	101	88	109	72	76
	Chocomel	92	113	96	97	75	60
	H&M	93	122	75	99	93	52
	Volvo	94	92	52	57	35	
	Bonduelle	95	89				
61-80%	ALDI	96	69	66	110	110	86
	Roompot Vakanties	97	132	65	72	85	
	Lipton Ice Tea	98					
	Grand'Italia	99	147	117	128	112	88
	Praxis	100	68	55	98	65	49
	Nespresso	101	74	78	75	36	73
	Dr. Oetker	102	128	106			
	Nike	103	76	92	67	100	51
	Knab	104	104	90	94	91	
	Côte d'Or	105	95	98	73	70	
	NESCAFÉ	106	93	95	92	50	70
	Zeeman	107	84	74	88	66	82
	Heinz	108	110	93	117	74	68
	Milka	109	83	112	115	95	
	Microsoft	110	78				
	Calvé	111	75	59	69	67	57
	Old Amsterdam	112	98	80	104	97	85
	SPAR	113	115	119	126	121	96
	Knorr	114	117	97	81	84	64
	Danio	115	106	83	100	83	61
	Kanis & Gunnink	116	119	91	119	76	39
	Unox	117	87	69			
	MAGGI	118	135	115	129	119	100
	Croma	119	144	151	121		
	Heineken	120	123	77	86	43	38
41-60%	Palmolive	121					
	Starbucks	122	103	82	83	61	
	Mora	123	108	137			
	ŠKODA	124	168	150	153	125	
	De Ruijter	125	96	68	113	58	71
	Volkswagen	126	112	102	87	113	
	Verstegen	127	124	122			
	Lindt	128	129				
	wehkamp	129	156	147	142	127	
	Nestlé Chocolade	130	86	104	90	54	
	NH Hotel Group	131	140	109	103	107	
	ABN AMRO	132	99	76	52	59	50
	Grolsch	133	158	85	106	108	47
	Zalando	134	133				
	NLE (Nederlandse Energie Maatschappij)	135	111	73	43	40	35

RANKING DEVELOPMENT 2017-2022

2022 Score		2022	2021	2020	2019	2018	2017
41-60%	Bona	136	118	127	77		
	Alliander	137	143	143	96	101	78
	Action	138	142	130	125	136	92
	Xenos	139	134	123	132	117	84
	Apple	140	100				
	CocaCola	141	97	87	95	51	36
	Mercure	142	121	153	108	98	
	Subway	143	150	125	141	106	90
	TMobile	144	146	105			
	NESCAFÉ Dolce Gusto	145	154	131	134	82	54
	Beter Bed	146	149	129	147	138	
	Oxxio	147	114	124	82	77	43
	Kia	148	116	110	85	80	
	McDonald’s	149	131	89	55	45	34
	MercedesBenz	150	157	121	101	88	
	Vodafone	151	120	116			
	Opel	152	137	118	112	94	
	BMW	153	141	99	116	109	
	De Bijenkorf	154	127	113	120	103	66
	Leen Bakker	155	153	140	118	133	81
	Kwantum	156	175	152	131	126	
	WE Fashion	157	170	155	143	123	97
	Bavaria	158	130	120	136	116	67
	Renault	159	174	126	140	99	
	Novotel	160	159	103	155	124	
	Amstel	161	152	128	137	79	80
	Andrélon	162					
	Peugeot	163	172	149	93	141	
	Sunweb	164	182	146	150	135	
	Fletcher Hotels	165	126	107	114	90	
	Booking.com	166	188	156			
	Mars	167	136	142	111	118	91
	Ola	168	145	114			
	JYSK	169	167	138	138	145	87
	Airbnb	170	161	139			
	MediaMarkt	171	125				
	TUI	172	181	144	139	104	
	Fanta	173	138				
	KITKAT	174	176	136	122	144	
	Schiphol	175	139	101	45	37	
	M&M’s	176	165	158	151	139	
	Sprite	177	171				
	FEBO	178	184	172	165	150	104
	Shell	179	169	141	78	96	56
	ZARA	180	151	164	162	132	102
	Oad	181	187	162	156	146	
	Toblerone	182	162	133	145	129	
	Ford	183	148	132	105	105	
	Goossens	184	191	154	133	137	105

RANKING DEVELOPMENT 2017-2022

2022 Score		2022	2021	2020	2019	2018	2017
	KLM	185	160	81	70	49	
	Corendon	186	177	168	163	140	
	Uber	187	178	169			
	Axe	188					
	Transavia	189	183	159	123	111	
41-60%	Tele2	190	163	134			
	Esso	191	185	157	127	92	63
	KFC	192	166	170	148	151	99
	Pepsi	193	155	166	135	120	94
	ibis	194	164	148	159	114	
	BURGER KING	195	192	173	146	152	98
	Total	196	193	174	154	128	95
	Amazon	197	179				
	Primark	198	190	171	149	134	103
	BP	199	186	161	152	122	83
21-40%	Trendhopper	200	180	167	166	149	
	easyJet	201	196	175	164	153	
35%	Ryanair	202	195	176	167	148	

04

INDUSTRY RANKINGS

2022

INDUSTRY OVERVIEW 2022

RANKING OF INDUSTRIES

The Industry Ranking overview shows how industries overall are perceived on sustainability according to Dutch consumers. The ranking of industries is based on the average ranking score of all the brands that are measured within that industry combined. Industries that rank high are on average more positively perceived on sustainability by Dutch consumers.

Ranking position	Industry
01.	SUPERMARKETS
02.	MOBILITY
03.	BANKS
04.	FOOD
05.	HEALTH INSURANCE
06.	ENERGY
07.	BEAUTY
08.	BEVERAGE
09.	E-COMMERCE
10.	DIGITAL
11.	RETAIL
12.	TRAVEL & TOURISM
13.	AUTOMOTIVE
14.	TELECOMMUNICATIONS
15.	HOTELS
16.	RESTAURANTS, CAFES & TAKE-AWAY
17.	AIRLINES

INDUSTRY WINNER

The Industry Winner overview shows the brands that are perceived as the most sustainable brand within their specific industry according to Dutch consumers.

In other words, the brand is ranked highest in comparison to the other brands that are measured within their industry, according to Sustainable Brand Index™ 2022.

Ranking position	Brand	Industry
1	DE VEGETARISCHE SLAGER	FOOD
3	GREENCHOICE	ENERGY
5	ANWB	MOBILITY
9	IKEA	RETAIL
10	ALBERT HEIJN	SUPERMARKETS
11	TESLA	AUTOMOTIVE
13	THE BODY SHOP	BEAUTY
17	ASN BANK	BANKS
21	BAR-LE-DUC	BEVERAGE
33	ANWB REIZEN	TRAVEL & TOURISM
34	BOL.COM	E-COMMERCE
53	CZ	HEALTH INSURANCE
60	VAN DER VALK	HOTELS
70	KPN	TELECOMMUNICATIONS
82	LA PLACE	RESTAURANTS, CAFES & TAKE-AWAY
89	GOOGLE	DIGITAL
185	KLM	AIRLINES

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY AIRLINES RANKS

17th

AIRLINES

Ranking position	Brand
185	KLM
189	Transavia
201	easyJet
202	Ryanair

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY AUTOMOTIVE RANKS

13th

AUTOMOTIVE

Ranking position	Brand
11	Tesla
76	Toyota
94	Volvo
124	ŠKODA
126	Volkswagen
148	Kia
150	Mercedes-Benz
152	Opel
153	BMW
159	Renault
163	Peugeot
183	Ford

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY BANKS RANKS

3rd

BANKS

Ranking position	Brand
17	ASN Bank
27	Triodos Bank
45	Rabobank
59	SNS Bank
75	ING
104	Knab
132	ABN AMRO

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY BEAUTY RANKS

7th

BEAUTY

Ranking position	Brand
13	The Body Shop
43	Rituals
68	Sanex
71	NIVEA
78	Dove
121	Palmolive
162	Andrélon
188	Axe

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY BEVERAGE RANKS

8th

BEVERAGE

Ranking position	Brand	Ranking position	Brand
21	Bar-le-Duc	116	Kanis & Gunnink
25	Spa	120	Heineken
31	Pickwick	133	Grolsch
46	Chaudfontaine	141	Coca-Cola
50	CoolBest	145	NESCAFÉ Dolce Gusto
52	innocent	158	Bavaria
55	Douwe Egberts	161	Amstel
56	Appelsientje	173	Fanta
66	Sourcy	177	Sprite
92	Chocomel	193	Pepsi
98	Lipton Ice Tea		
101	Nespresso		
106	NESCAFÉ		

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY DIGITAL RANKS

10th

DIGITAL

Ranking position	Brand
89	Google
110	Microsoft
140	Apple

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY E-COMMERCE RANKS

9th

E-COMMERCE

Ranking position	Brand
34	bol.com
37	Coolblue
129	wehkamp
134	Zalando
197	Amazon

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY ENERGY RANKS

6th

ENERGY

Ranking position	Brand
3	Greenchoice
15	Vattenfall
16	Essent
19	Vandebron
28	Eneco
62	energiedirect.nl
74	ENGIE
135	NLE (Nederlandse Energie Maatschappij)
137	Alliander
147	Oxxio
179	Shell
191	Esso
196	Total
199	BP

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY FOOD RANKS

4th

FOOD

Ranking position	Brand	Ranking position	Brand	Ranking position	Brand
1	De Vegetarische Slager	49	Maaslander	117	Unox
2	Tony's Chocolonely	51	Bolletje	118	MAGGI
4	Zonnatura	57	Aviko	119	Croma
7	Valess	61	Almhof	123	Mora
8	Alpro	67	Iglo	125	De Ruijter
12	HAK	69	Blue Band	127	Verstegen
14	Campina	72	Verkade	128	Lindt
20	Vivera	79	Bertolli	130	Nestlé Chocolade
22	Arla	81	Honig	136	Bona
23	Beemster kaas	95	Bonduelle	167	Mars
26	Melkunie	99	Grand'Italia	168	Ola
29	Optimel	102	Dr. Oetker	174	KITKAT
32	Becel Pro Activ	105	Côte d'Or	176	M&M's
36	Garden Gourmet	108	Heinz	182	Toblerone
38	Becel	109	Milka		
41	Activia	111	Calvé		
42	Oatly	112	Old Amsterdam		
47	Campina Botergoud	114	Knorr		
48	Milner	115	Danio		

SUSTAINABLE BRAND INDEX

2022

INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY HEALTH INSURANCE RANKS

5th

HEALTH INSURANCE

Ranking position	Brand
53	CZ
80	VGZ
87	Achmea
90	Menzis

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY HOTELS RANKS

15th

HOTELS

Ranking position	Brand
60	Van der Valk
131	NH Hotel Group
142	Mercure
160	Novotel
165	Fletcher Hotels
194	ibis

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY MOBILITY RANKS

2nd

MOBILITY

Ranking position	Brand	Ranking position	Brand
5	ANWB		
6	NS		
63	Connexxion		
64	Arriva		
175	Schiphol		
187	Uber		

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY RESTAURANTS, CAFES & TAKE-AWAY RANKS

16th

RESTAURANTS, CAFES & TAKE-AWAY

Ranking position	Brand
82	La Place
122	Starbucks
143	Subway
149	McDonald's
178	FEBO
192	KFC
195	BURGER KING

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY RETAIL RANKS

11th

RETAIL

Ranking position	Brand	Ranking position	Brand
9	IKEA	139	Xenos
30	HEMA	146	Beter Bed
39	Philips	154	De Bijenkorf
44	Etos	155	Leen Bakker
58	Kruidvat	156	Kwantum
83	Siemens	157	WE Fashion
84	Blokker	169	JYSK
85	Karwei	171	MediaMarkt
86	C&A	180	ZARA
91	GAMMA	184	Goossens
93	H&M	198	Primark
100	Praxis	200	Trendhopper
103	Nike		
107	Zeeman		
138	Action		

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY SUPERMARKETS RANKS

1st

SUPERMARKETS

Ranking position	Brand
10	Albert Heijn
18	Lidl
24	Jumbo
35	PLUS
65	Coop
88	Dirk
96	ALDI
113	SPAR

SUSTAINABLE BRAND INDEX

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY TELECOMMUNICATIONS RANKS

14th

TELECOMMUNICATIONS

Ranking position	Brand
70	KPN
144	T-Mobile
151	Vodafone
190	Tele2

SUSTAINABLE BRAND INDEX

THE NETHERLANDS

2022
INDUSTRY RANKING

OUT OF THE TOTAL 17 INDUSTRIES MEASURED, THE INDUSTRY TRAVEL & TOURISM RANKS

12th

TRAVEL & TOURISM

Ranking position	Brand
33	ANWB Reizen
40	Landal GreenParks
54	Center Parks
97	Roompot Vakanties
164	Sunweb
166	Booking.com
170	Airbnb
172	TUI
181	Oad
186	Corendon

SUSTAINABLE BRAND INDEX

On a mission to create sustainable brands.

SB Insight is the founder of Sustainable Brand Index™, Europe's largest independent brand study on sustainability. We are a Stockholm-based insight agency on a mission to create sustainable brands. We provide decision-making material on how sustainability affects branding, communication and business development. Through in-depth studies, reports and education solutions, we offer our clients data driven sustainability insights, tailored analysis and strategic tools.

Our team helps you in your transition to building a more sustainable brand. With over ten years of experience and data from different sectors and markets, we have broad and in-depth knowledge of brands, industries, consumers and market developments. We help you by creating a holistic sustainability analysis that can be difficult to create on your own.

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SUSTAINABLE BRAND INDEX

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