WFA Planet Pledge

Sustainable marketing 2030.

"A sustainable growth framework for marketing"

Deep-dive report: Turkey

rvd REKLAM VERENLER DERNEĞİ KANTAR

May 2023

Agenda

- Introducing this report
- An overview of the global results
- Turkey 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 exploratory 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

Our global community.

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

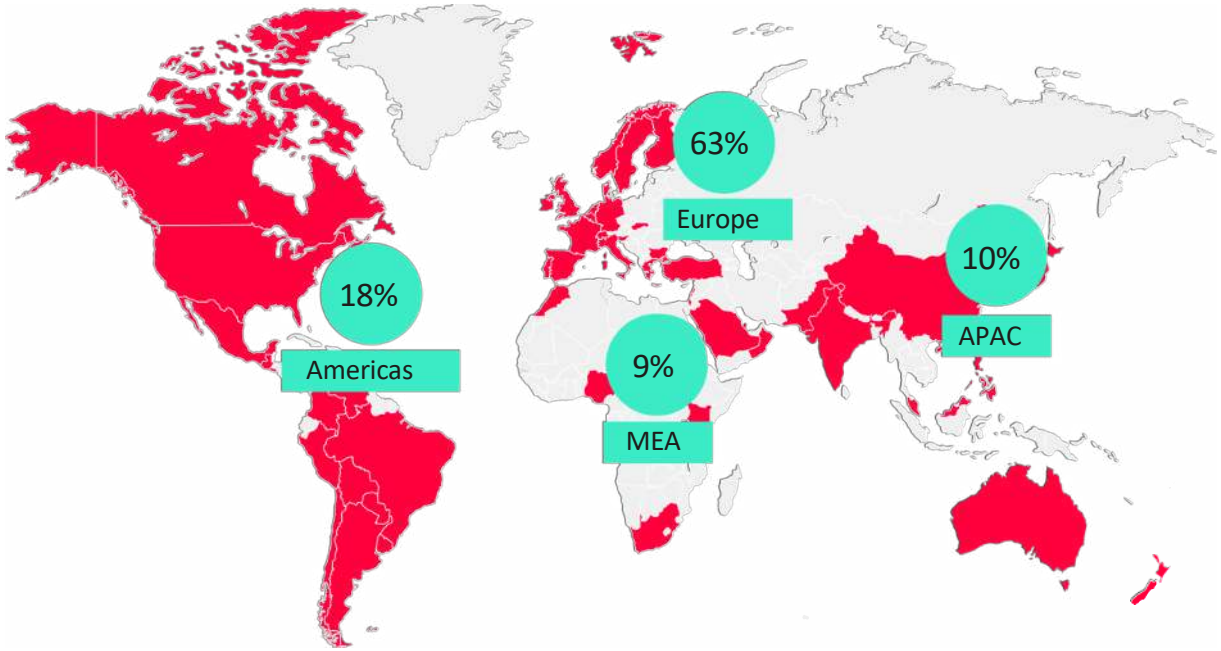
John Schoolcraft

Charmian Love

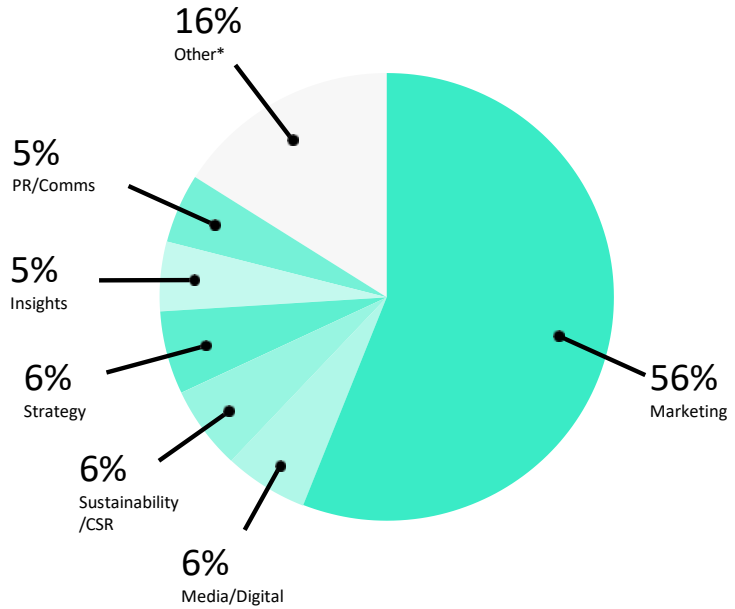
Who did we interview?

Global quantitative sample.

Respondent split across the world.



Respondent split across functions.

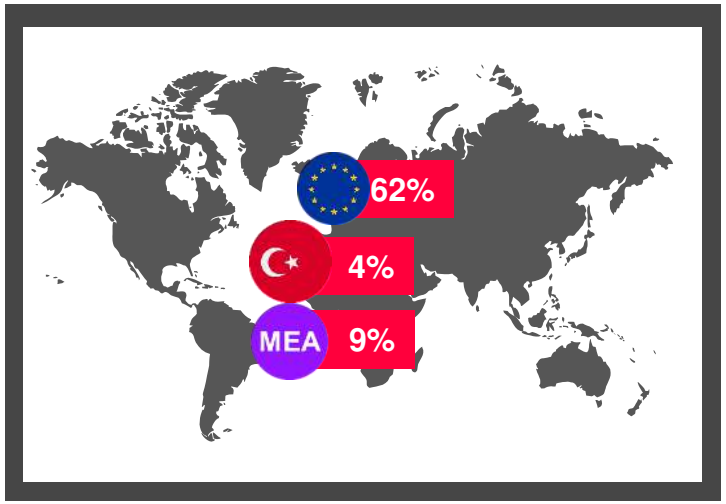


*Other includes Marketing procurement/Sourcing, Public/ government/external affairs/ Sales/eCommerce and Other and were not represented individually as they represent less than 5% of the answers

Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Global Base: 938 respondents from 48 countries

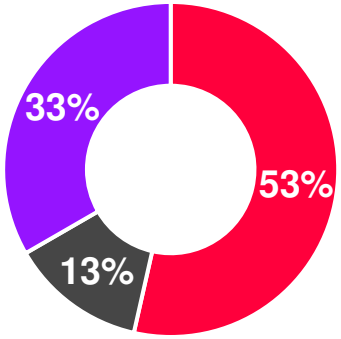
Who did we interview?

Sample profile (at company level)



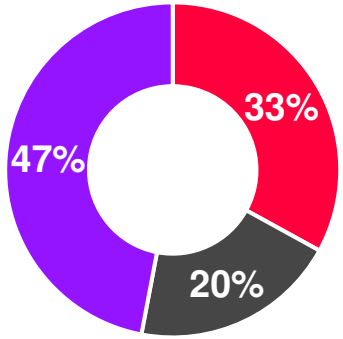
Calculated out of total sample

Business Focus



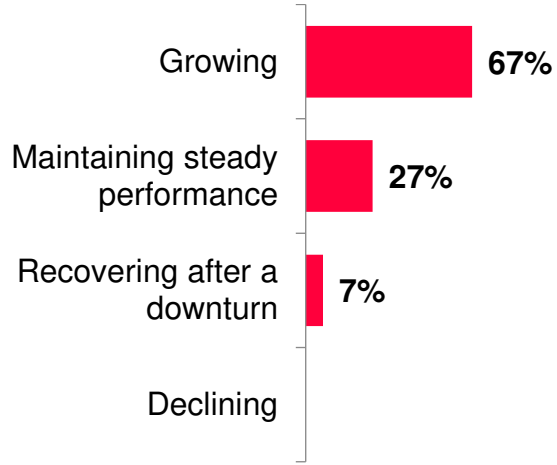
- Business to Consumer (B2C)
- Business to Business (B2B)
- Both

Company size
(by no. of employees)

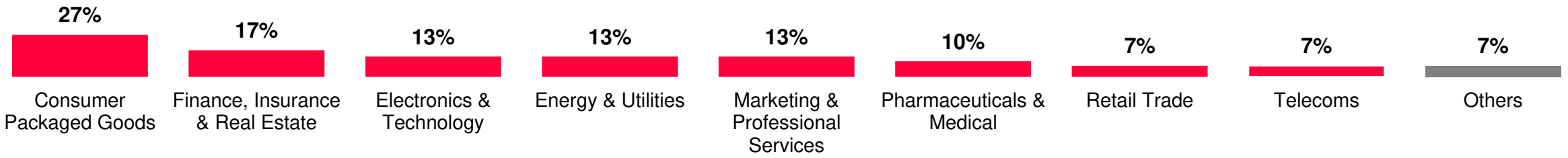


- Small (< 1000 empl.)
- Medium (1000-5,000 empl.)
- Large (> 5,000 empl.)

Current business performance



Company sector

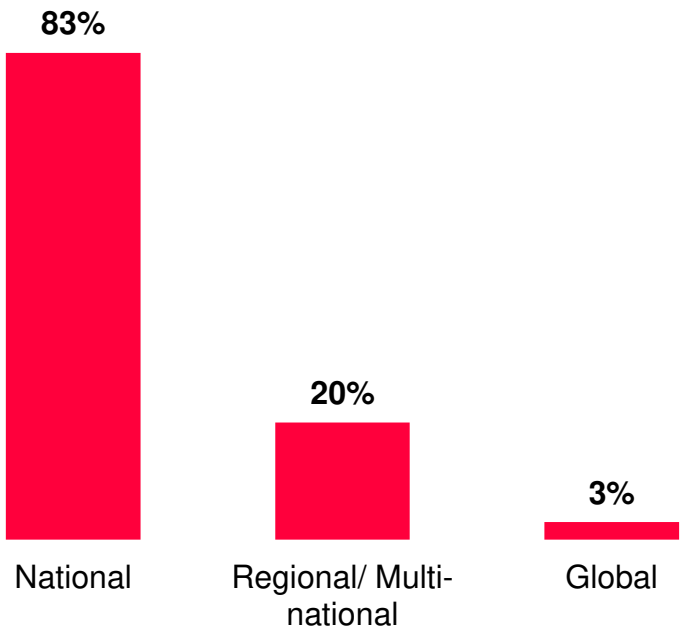


Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Turkey Base: 37 respondents

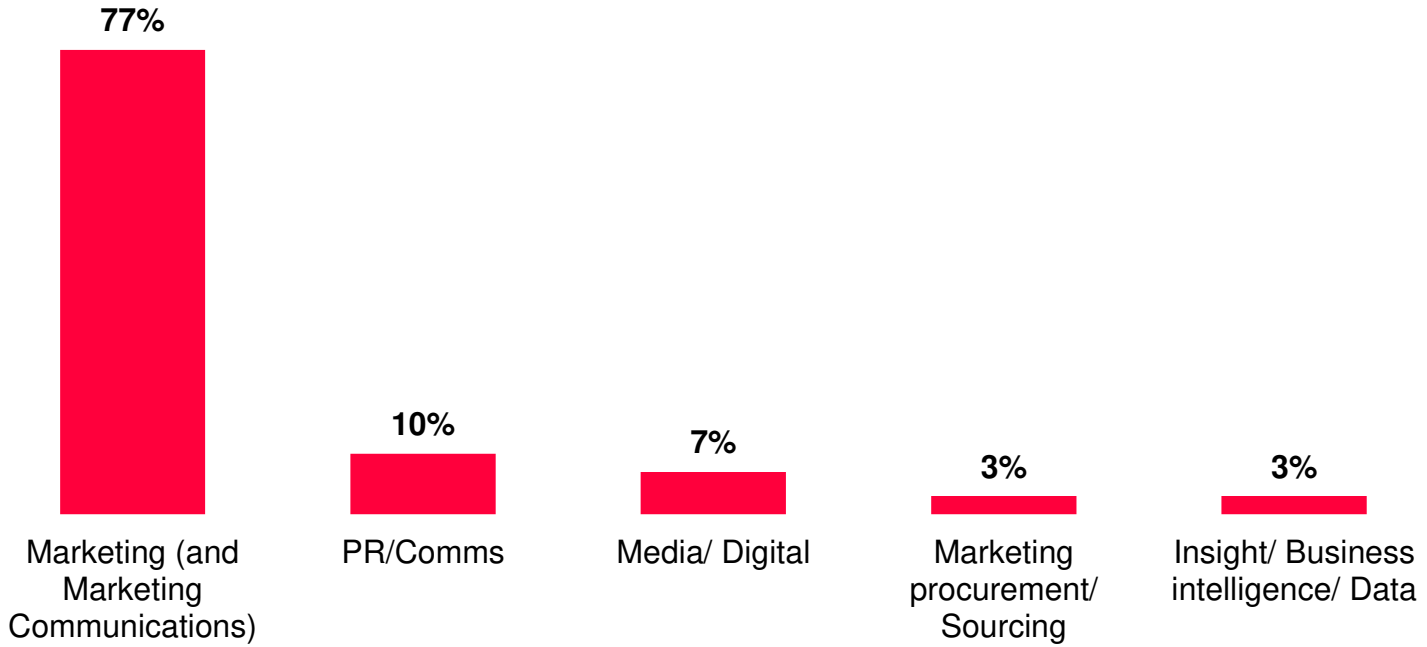
Who did we interview?

Sample profile (at respondent level)

Respondent's remit
(multiple choice possible)



Business roles



Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Turkey Base: 37 respondents

How to read the norms

This report illustrates the results at 4 levels:

- Country deep-dive ( )
- MEA norm ( )
- Europe norm ( )
- Global norm ( )

How are the differences highlighted?

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

2021 *Where comparable, we have included some references from 2021 data, illustrating through arrows significant changes in 2023 vs 2021.*

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….

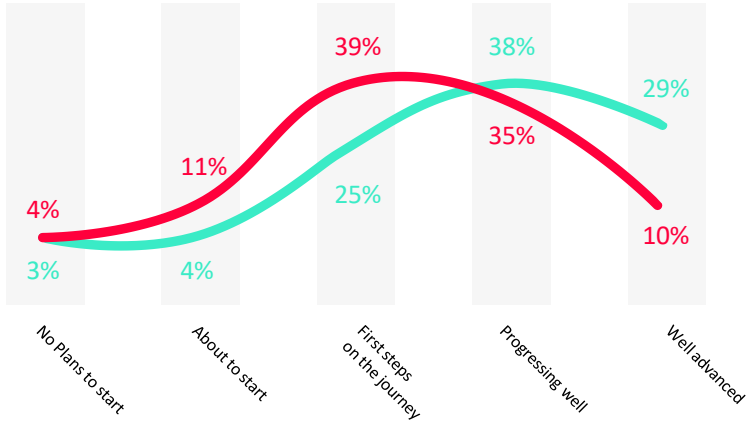
90%

of marketers agreeing that sustainability agendas must be more ambitious

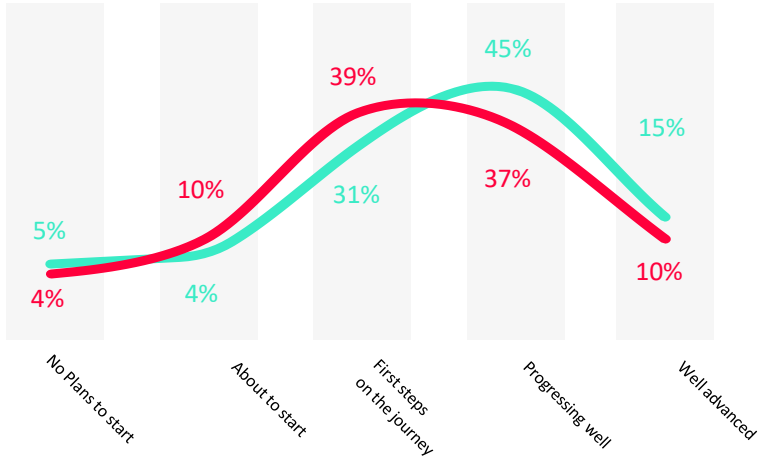
94%

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)



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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, Programme 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

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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

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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

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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%

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5 key framing principles to drive progress.

"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

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.

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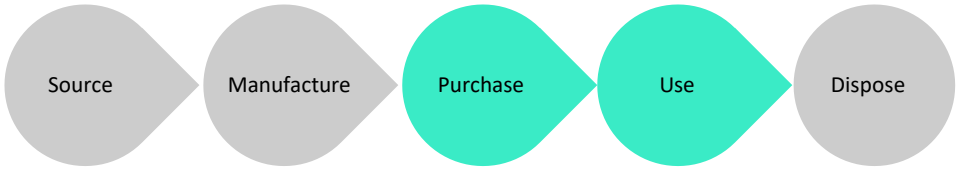
Circular marketing & growth: shifting from a linear to a circular discipline.

"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

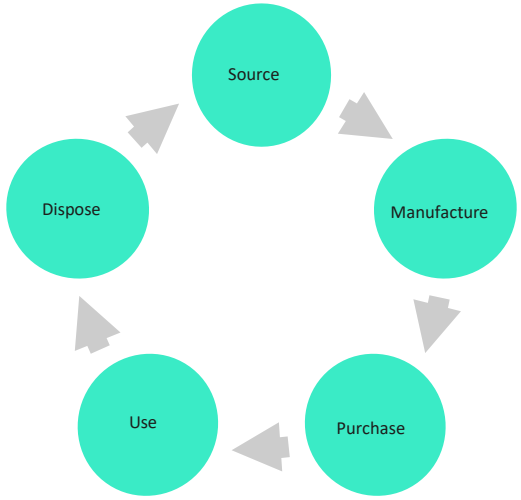
From.

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.



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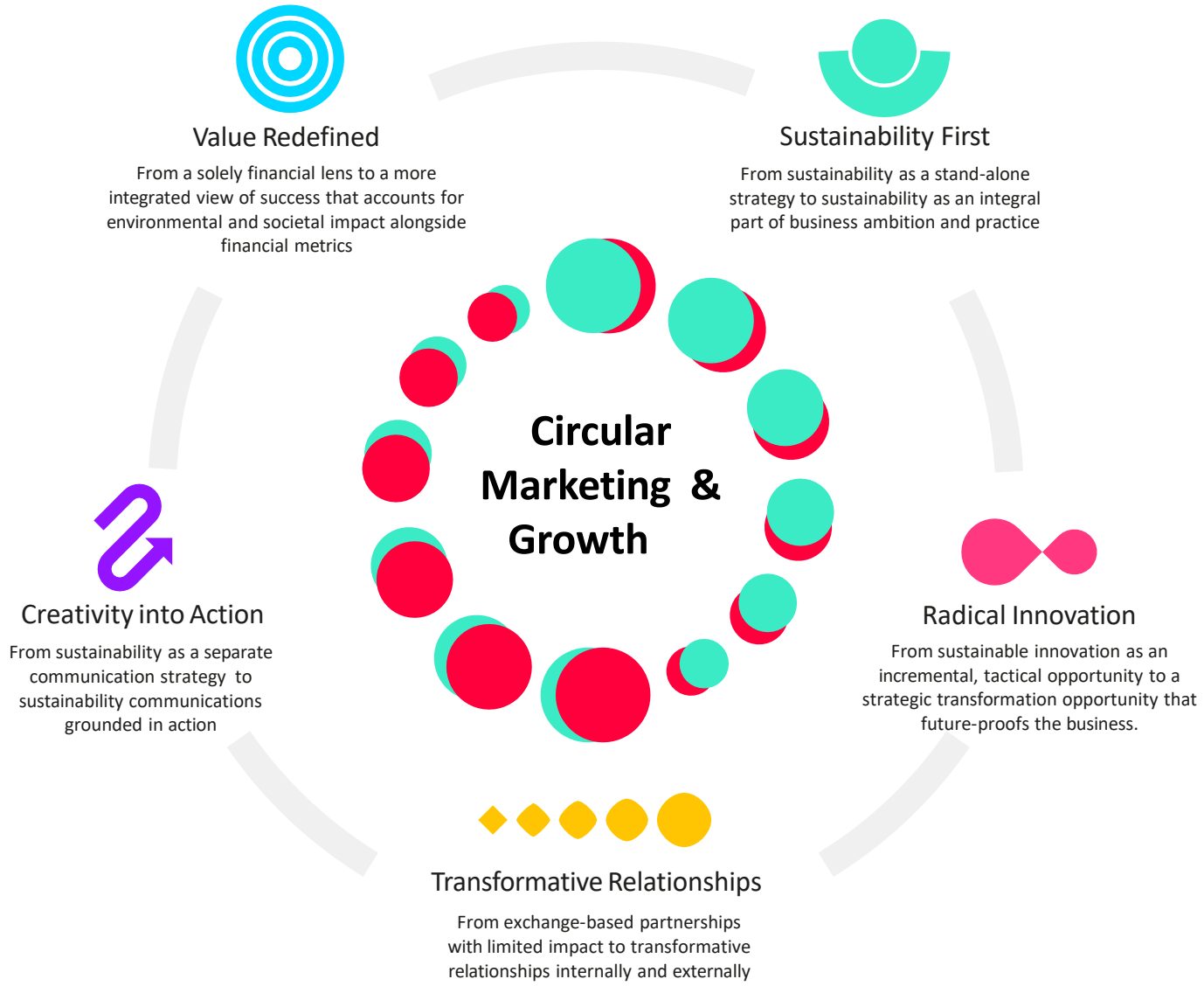

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Turkey deep-dive results

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 Turkish marketers, in line 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

95%

MEA

96%

97%

98%

*% Saying Yes

What would you add, remove?
(Open answers)

In Turkish marketers' words…

"Need to compromise today's goodwill in order to have a progress and create a better planet for future generations."

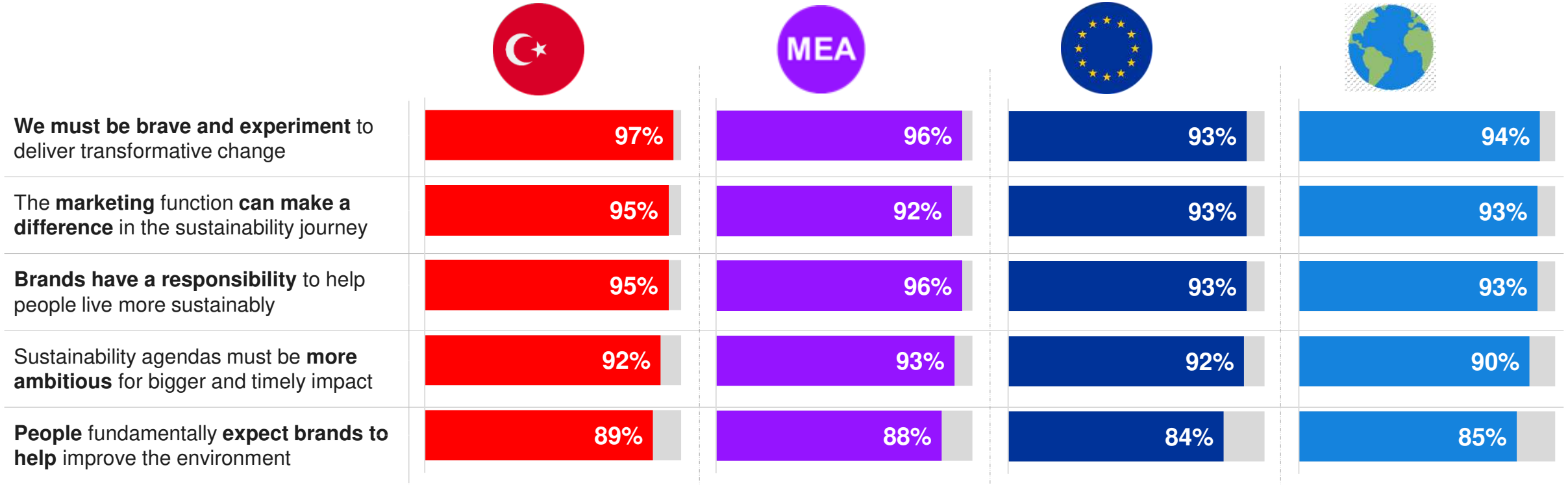
(Marketing, Global role)

L5. Do you agree with this definition? *Single answer* L6. What would you add, remove from the given sustainability definition? *Open Answers*
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

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

The role of marketing in the sustainability journey

Turkish 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. The strongest belief is that it is **imperative to be brave and experiment**, in order to deliver transformative change.



*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*

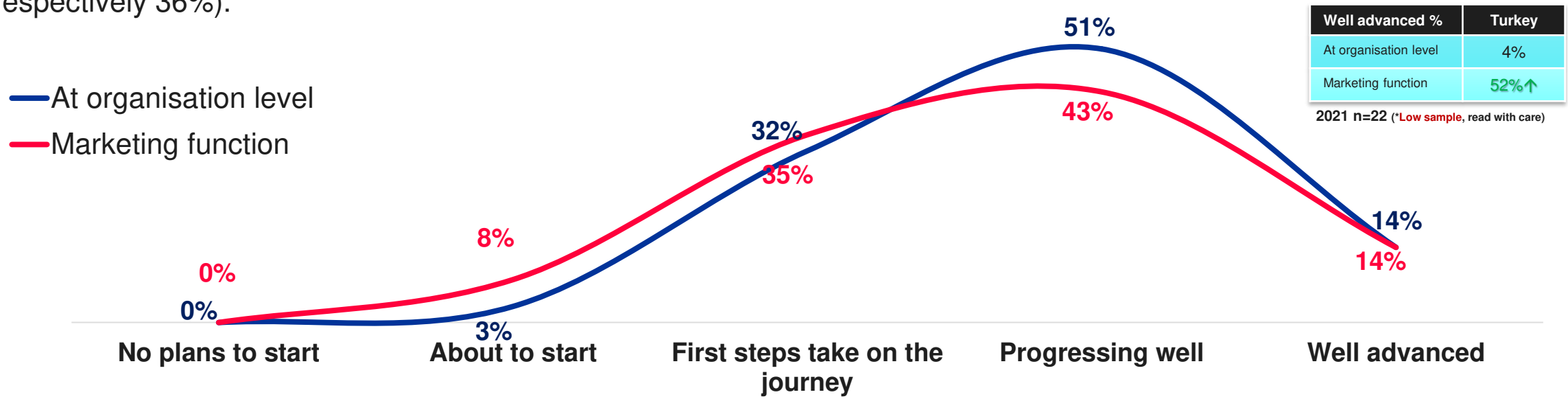
Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

↑ ↓ 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 Turkey. Worth mentioning that, based on our interviews, 43% of the client-side marketers in Turkey are indicating they are 'progressing well', directionally higher than the regional and global benchmarks, at marketing function level (37% respectively 36%).



Well advanced %	Turkey
At organisation level	4%
Marketing function	52%↑

2021 n=22 (*Low sample, read with care)

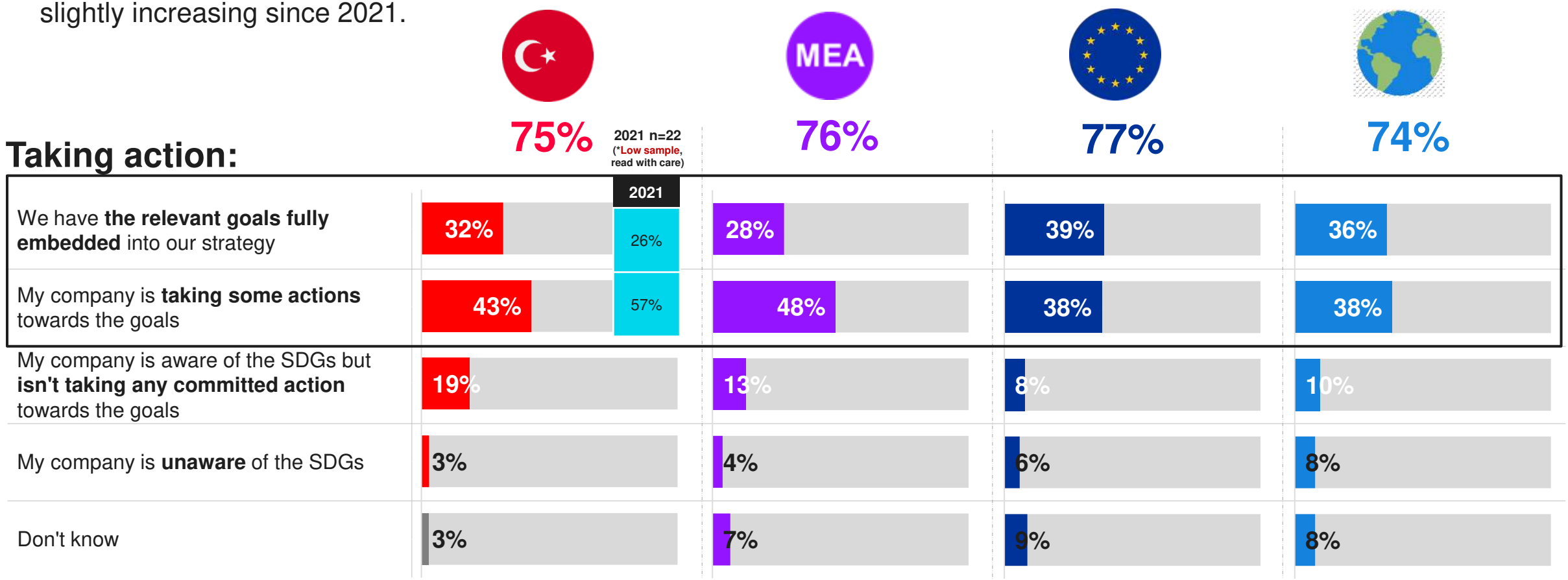
Benchmarks	No plans to start			About to start			First steps…			Progressing well			Well advanced		
	Global	Europe	MEA	Global	Europe	MEA	Global	Europe	MEA	Global	Europe	MEA	Global	Europe	MEA
At organisation level	4%	3%	5%	4%	3%	4%	31%	33%	27%	44%	45%	49%	15%	15%	15%
Marketing function	2%	2%	3%	10%	8%	8%	39%	41%	41%	36%	37%	37%	10%	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 | MEA Base: 82 | Turkey Base: 37 respondents

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

75% are taking action towards the UN's SDGs

3 out of 4 client-side marketers are taking actions related to the UN Sustainable Development Goals (SDGs), in line with the global trend. One third claim they already have the **relevant goals fully embedded** into their organisation strategy, slightly increasing since 2021.



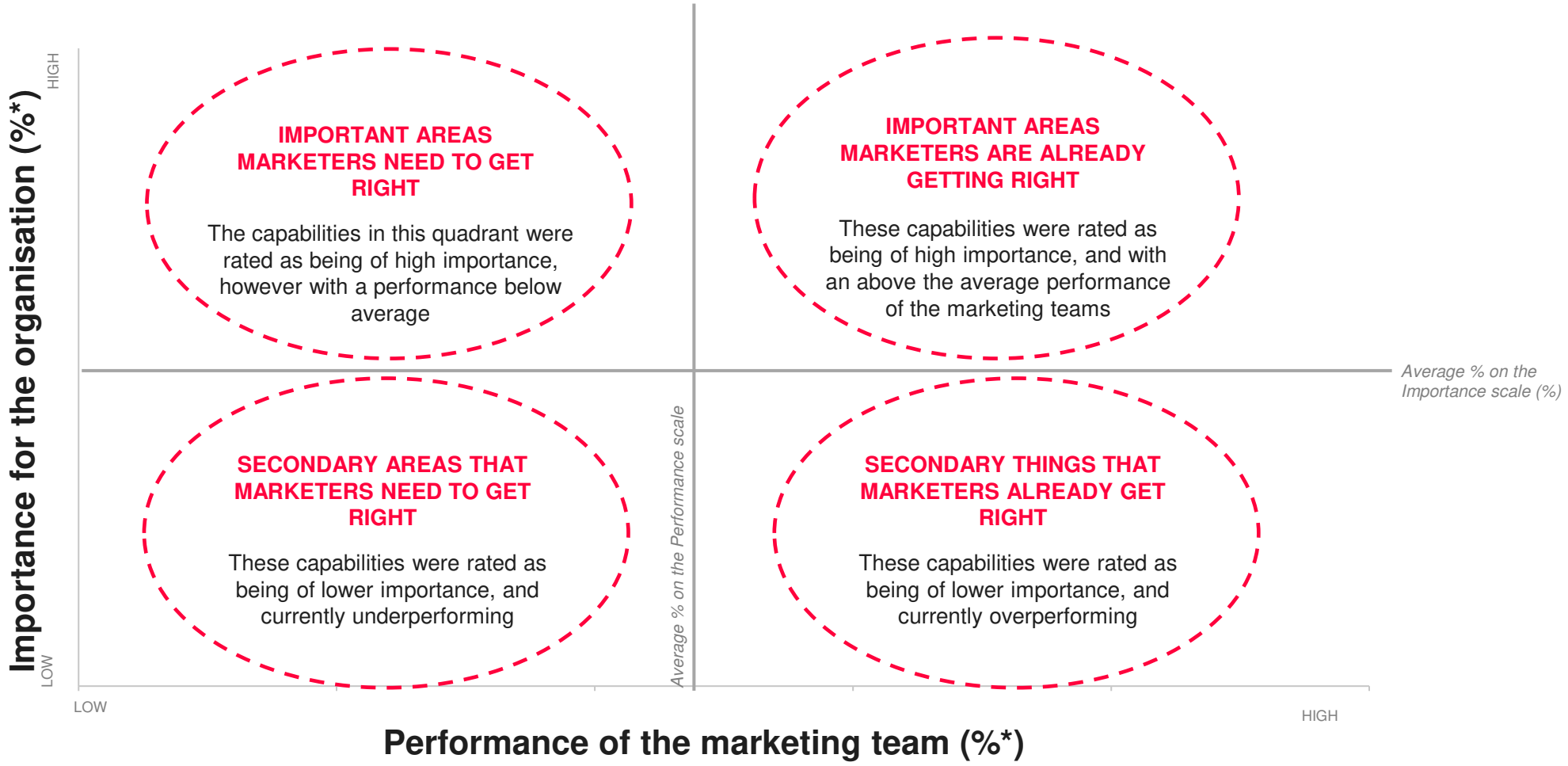
A3. The Sustainable Development Goals (SDGs) are a collection of 17 interlinked global goals designed to be a "blueprint to achieve a better and more sustainable future for all", set by the United Nations in 2015 and are intended to be achieved by 2030. Is there an awareness of the SDGs within your company? *Single answer*

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

Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

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

Gap analysis – How to read



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

Marketing and Sustainability – Turkey focus

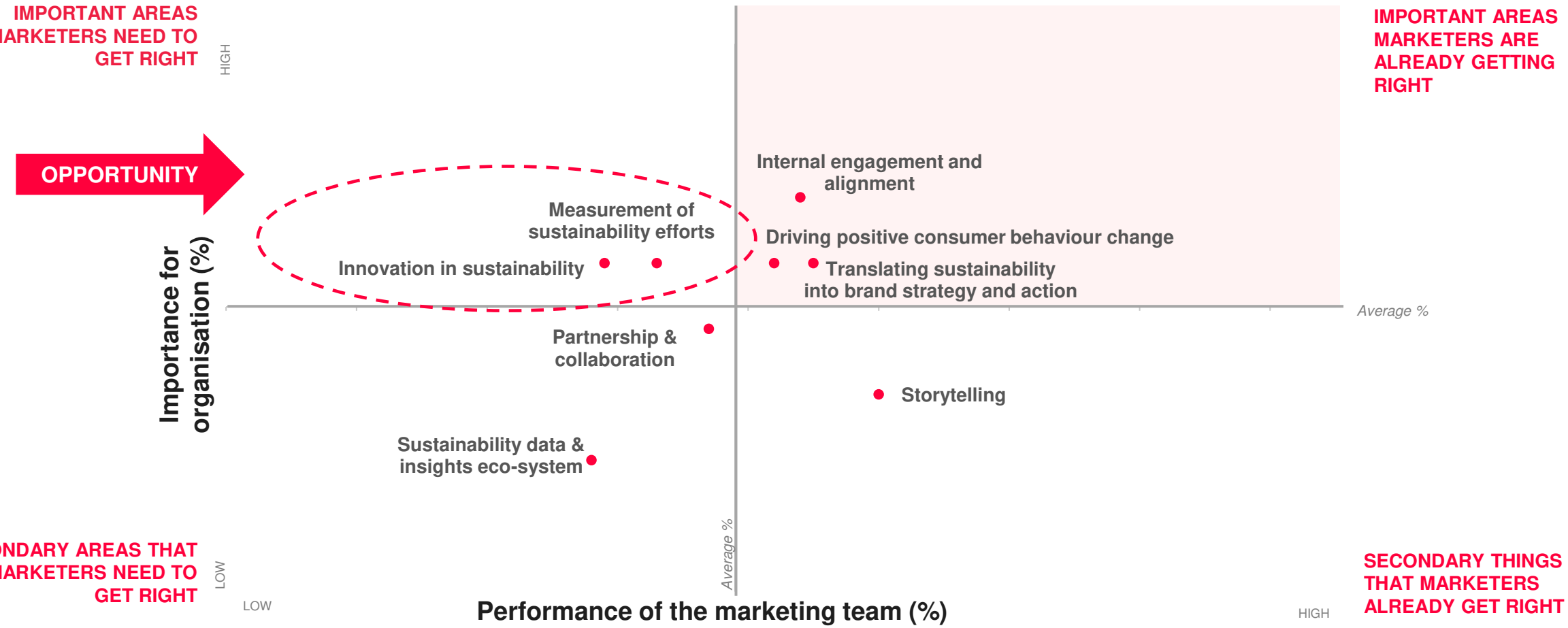
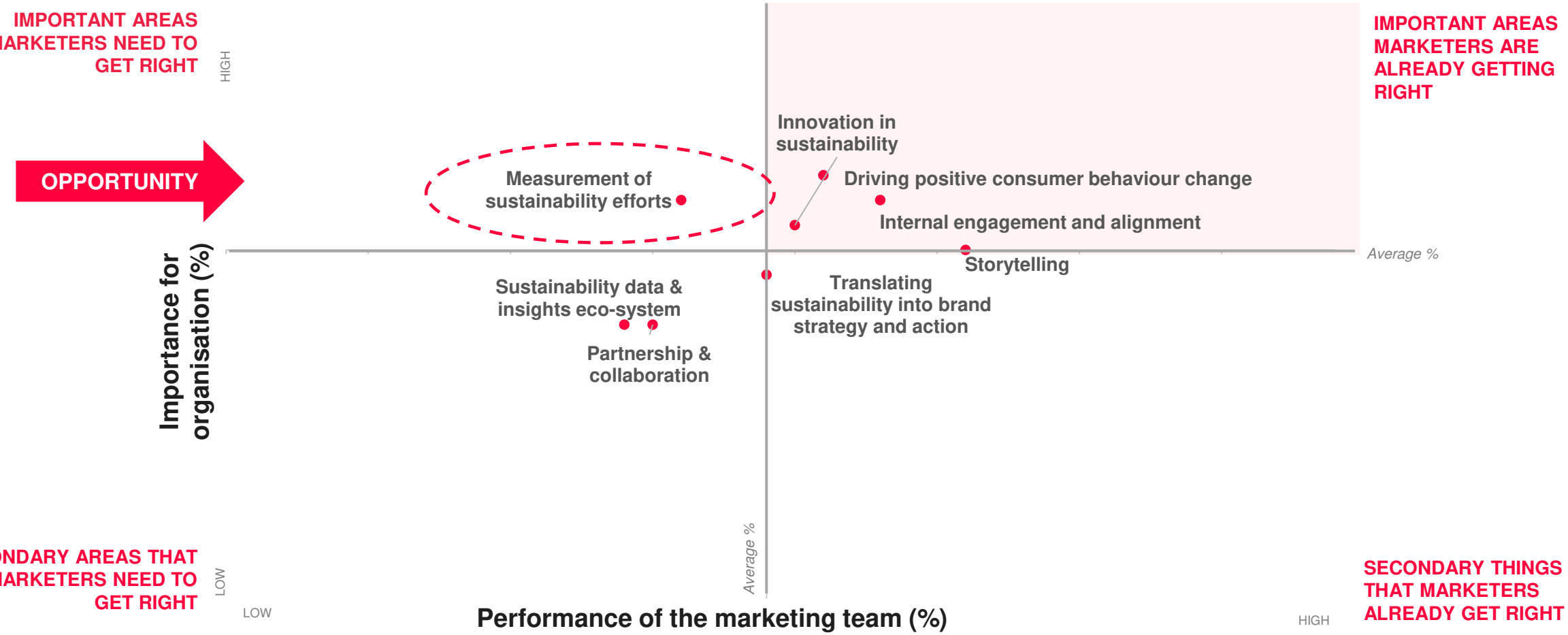


Chart shows Important/ strong capabilities % (Top 2 answers on a 5 points scale)

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*
Turkey Base: 37 respondents

Marketing and Sustainability – Middle East and Africa



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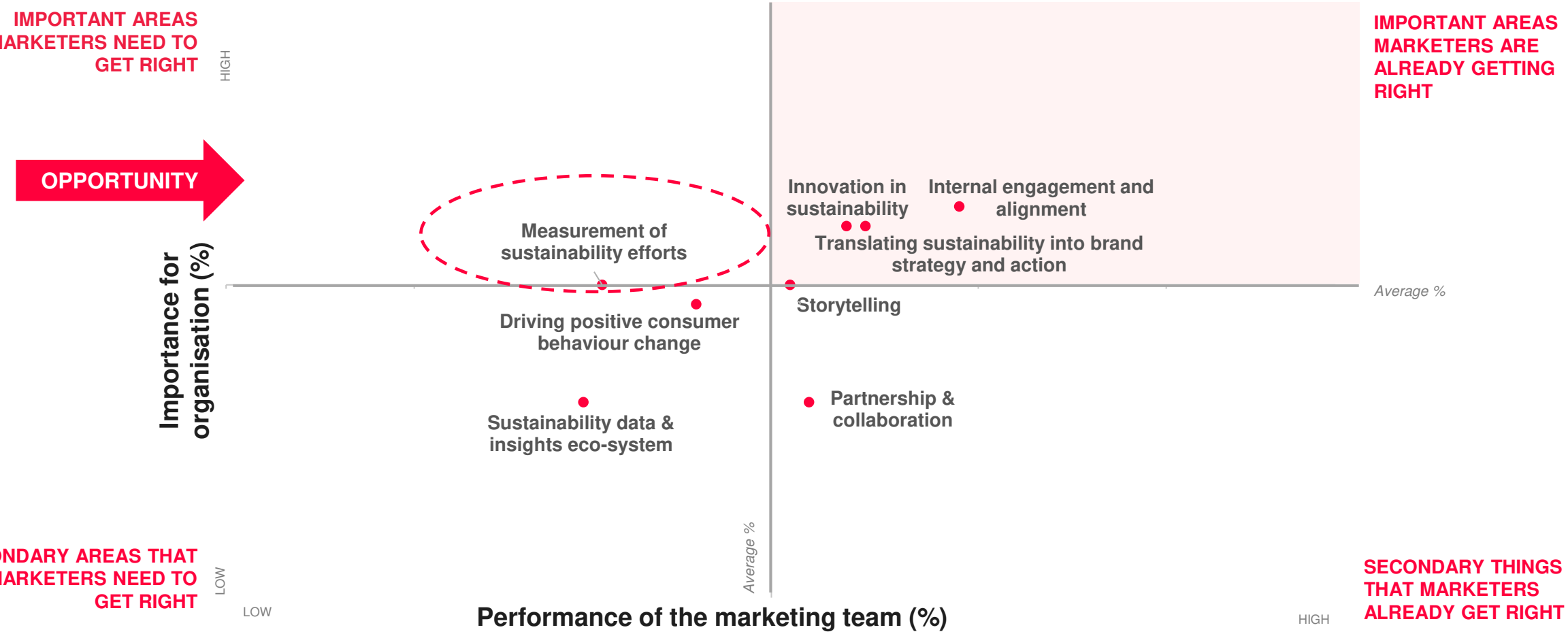
MEA Base: 82 respondents

Marketing and Sustainability – EUROPE



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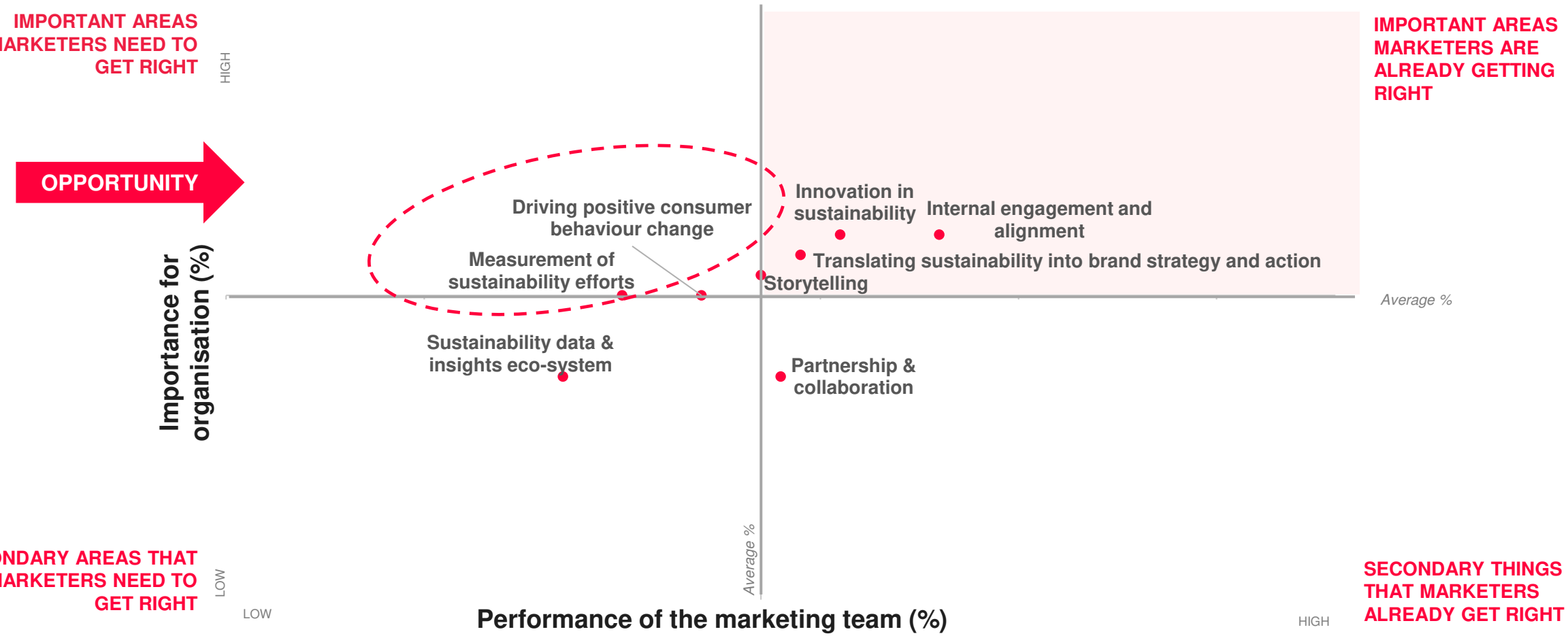
Europe Base: 577 respondents

Marketing and Sustainability – GLOBAL



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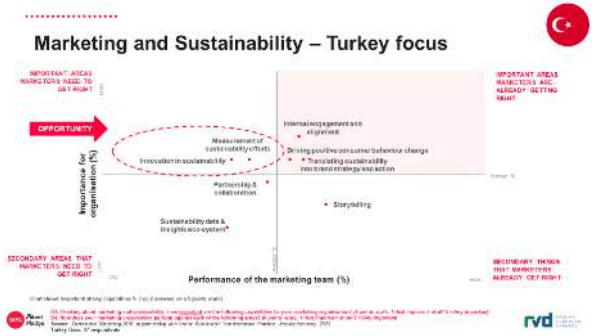
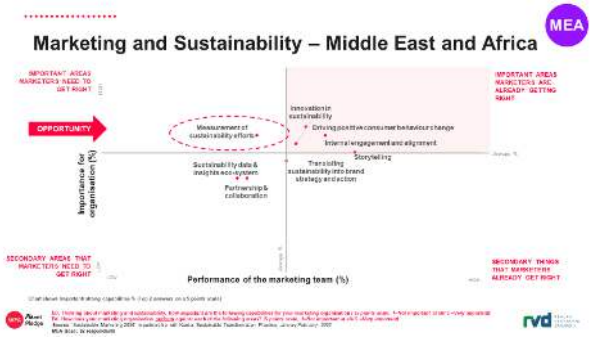
Global Base: 938 respondents

Gap analysis – Key learnings for Turkey

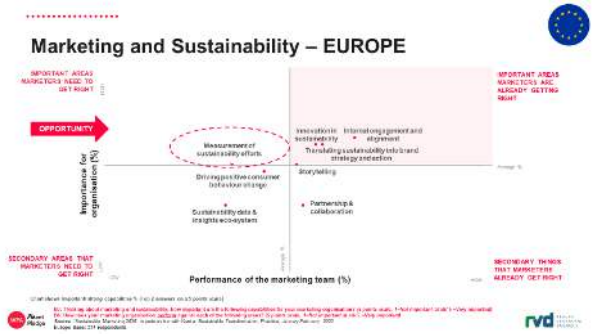
Market & Business initiatives – Turkey –



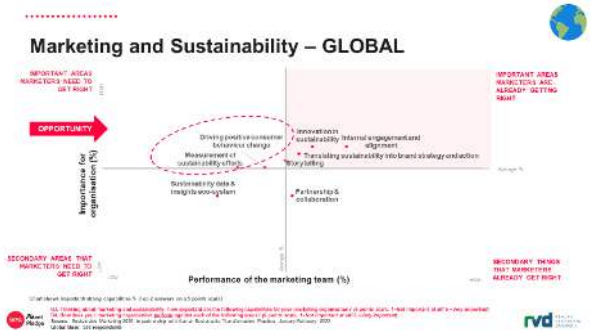
Market & Business initiatives – MEA benchmark –



Market & Business initiatives – EUROPE benchmark –



Market & Business initiatives – Global benchmark –



Where does Turkey stand versus regional and global norms?

Senior marketers in Turkey are confident on the **internal engagement** – an aspect on which their organisations perform above average today. **Measuring sustainability efforts** represents an opportunity for marketers in Turkey (and globally).

In MEA, Europe and globally we have seen that **innovation in sustainability** is an aspect on which organisations are performing well, as compared with Turkey, where is standing out today as rather an area of improvement.

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 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

Challenges and Opportunities

Senior marketers indicate diverse challenges in the sustainability space, with **lack of P&L policy** that treats equally the planet and profit being on top. A directionally higher score for **difficulty to organise & implement cross-industries initiatives** when comparing with MEA and global norms. When it comes to opportunities, **consumer education, innovation and new business models** stand out – in Turkey and globally alike.

Main challenges in progressing sustainability ambitions

		MEA	Europe	Global
Lack of P&L policy that treats planet and profit equally	**38%**	32%	36%	35%
Difficulty to organize and implement crossindustry initiatives	**35%**	28%	25%	26%
Internal mindset that sustainable solutions are more costly	**32%**	34%	32%	32%
Conflict with current business strategy and priorities	**27%**	24%	28%	28%
Lack of allocated internal resources	**27%**	35%	35%	35%
Marketing's knowledge and skills gap on sustainability	**27%**	38%	32%	35%
No robust and transparent way of measuring progress	**24%**	29%	33%	30%
Sustainability claims not backed by action	**24%**	26%	27%	23%
No/poor industry consensus, norms, and regulations	**22%**	24%	23%	22%
Sustainability initiatives led in silos/adjacent to marketing	**19%**	23%	28%	30%
Staying on top of discussions and knowing how to act	**14%**	11%	29%↑	25%↑

Main opportunities for marketing organisation

		MEA	Europe	Global
Educate people about their choices and actions at mass scale	**62%**	56%	56%	54%
Innovate to create competitive advantage	**51%**	54%	56%	57%
Define new business models to grow sustainably	**51%**	54%	56%	55%
Expand marketing's opportunities in the value chain	**49%**	48%	41%	44%
Collective action to drive bigger impact	**27%**	33%	48%↑	46%↑
Drive talent acquisition and retention	**19%**	22%	30%	31%
Capitalize on consumer activism towards a sustainable lifestyle	**16%**	38%↑	30%	33%↑
Premiumisation (superior product quality and exclusivity)	**14%**	17%	24%	23%
Cost savings	**8%**	17%	18%	18%

WFA Planet Pledge

B2. Which of the following do you feel are the biggest challenges you face in realising the sustainability ambitions within your marketing organisation? *Multiple answer* B5: Which of the following do you feel are the biggest opportunities for your marketing organisation which can be realised through a commitment to sustainability initiatives? *Multiple answer*
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

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

rvd REKLAM VERENLER DERNEĞİ

3. Sustainability performance across marketing levers

Strategy & Portfolio

Innovation

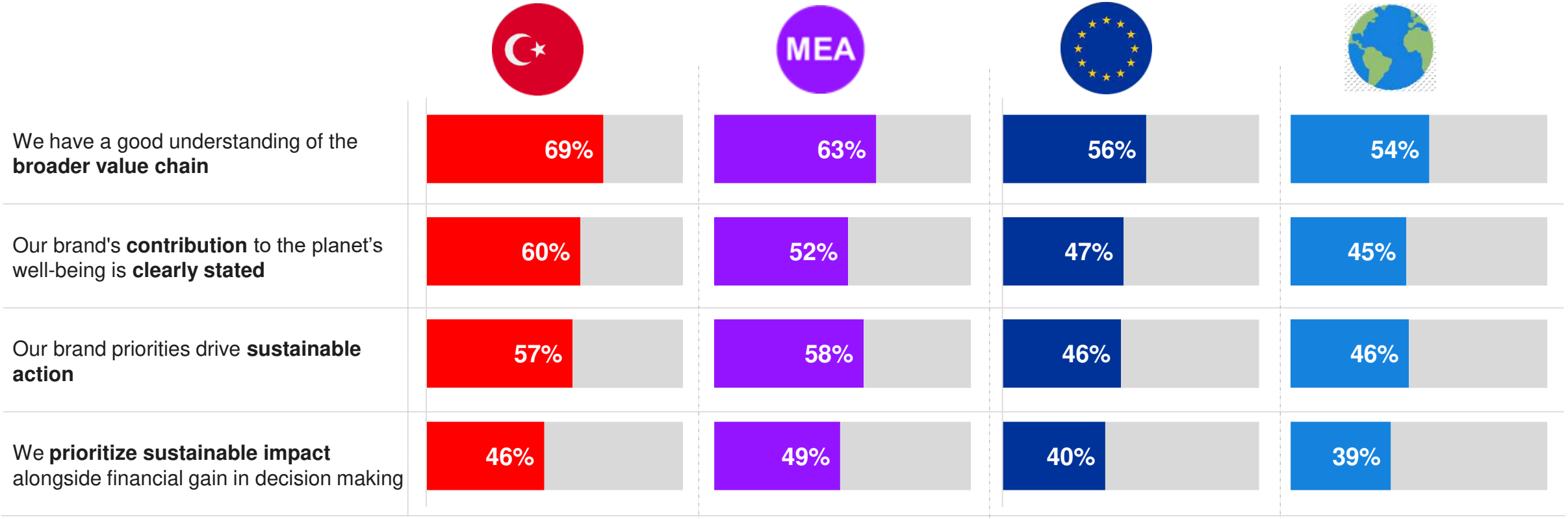
Measurement

Communication

Partnership & Collaboration

69% claim a good understanding of the broader value chain

2 out of 3 Turkish marketers claim they progressed well in owning a **good understanding** of the broader value chain, directionally higher than the European and global benchmarks. More than half think that their brand have a **clearly stated contribution** to the planet's well-being and **sustainable actions** are prioritized. The financial gain is still prioritized over sustainable impact, showing room to improve – slightly better claimed progress in Turkey vs global norms.



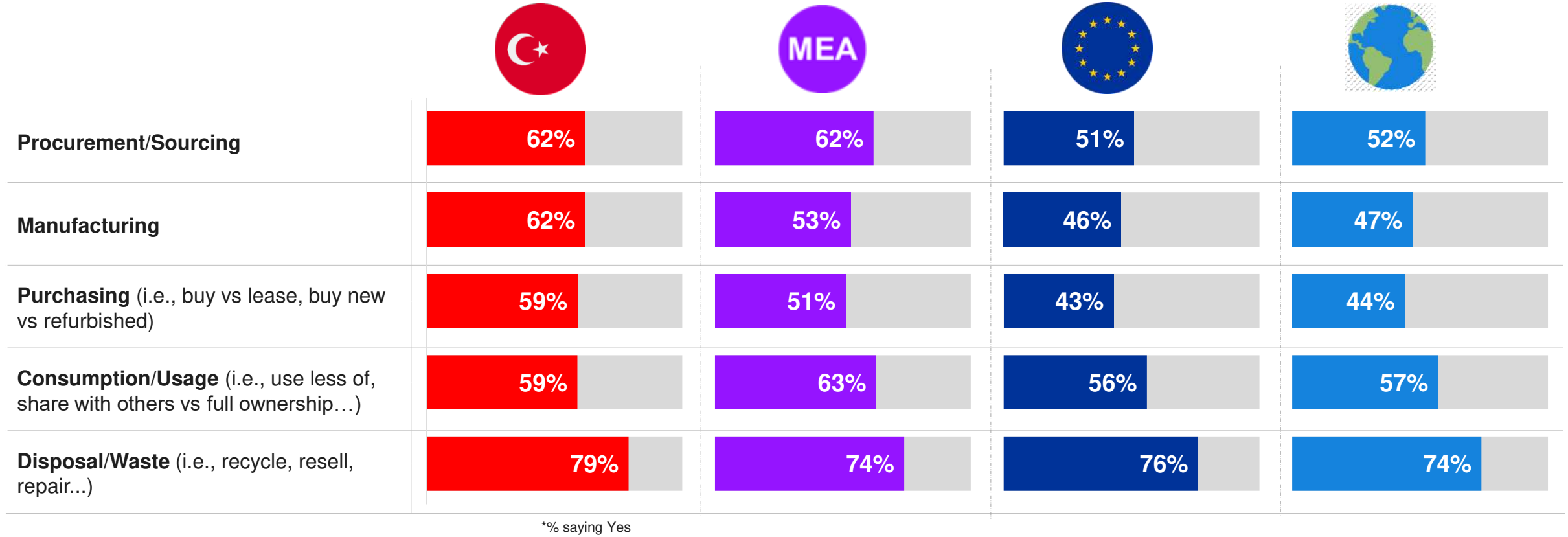
*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

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 | MEA Base: 82 | Turkey Base: 37 respondents

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

79% 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 **manufacturing, purchasing and sourcing processes** as compared to Europe or worldwide.



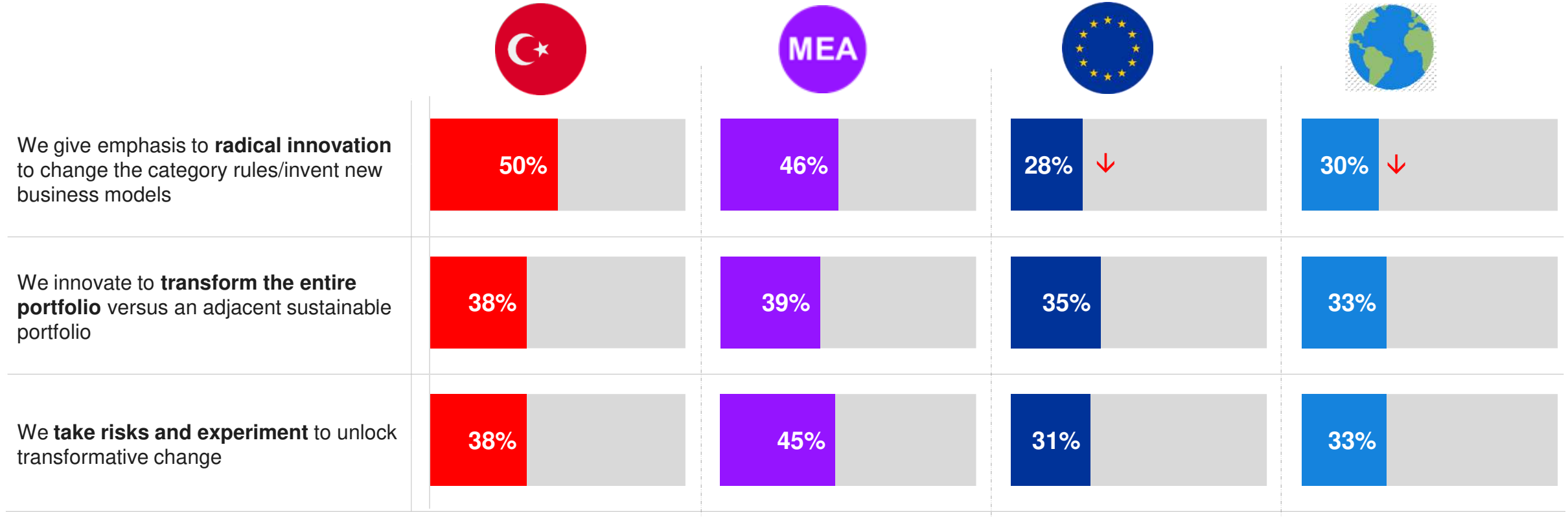
*% saying Yes

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 | MEA Base: 82 | Turkey Base: 37 respondents

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

1 in 2 claim a good progress on sustainability innovation

Half of the interviewed Turkish marketers are confident on their progress in giving **emphasis to radical innovation** to change the category rules or invent new business models – a tendency significantly higher than the European or global trend.



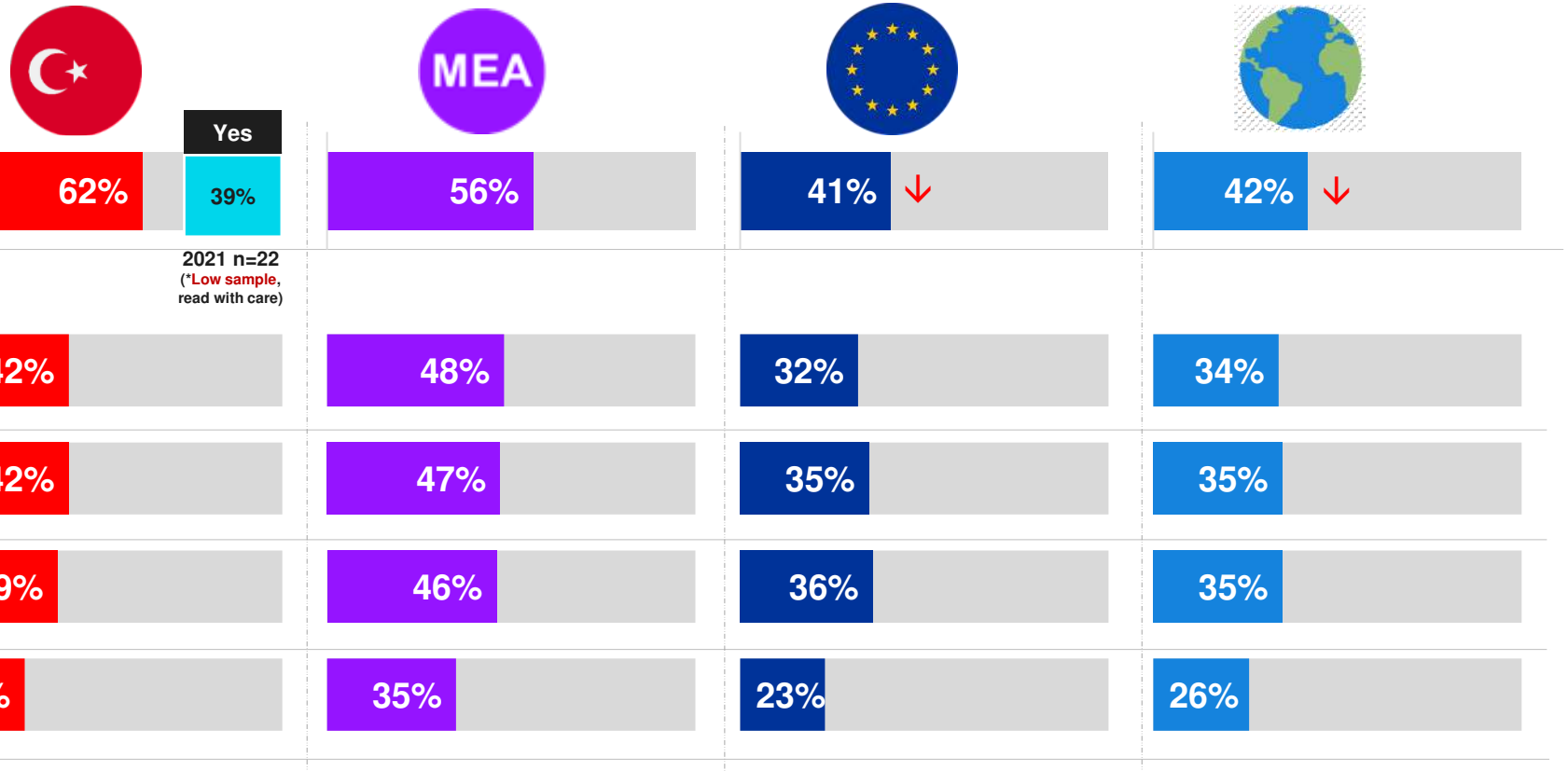
*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

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*
Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

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

62% stated that sustainability is set as a marketing KPI

Furthermore, 3 in 5 Turkish marketers have stated that **sustainability is set as a KPI on the marketing dashboard** (more so than in 2021), significantly higher than their European and global peers. Yet, only one third agreed that **environmental objectives** are part of their performance appraisal and bonus scheme.



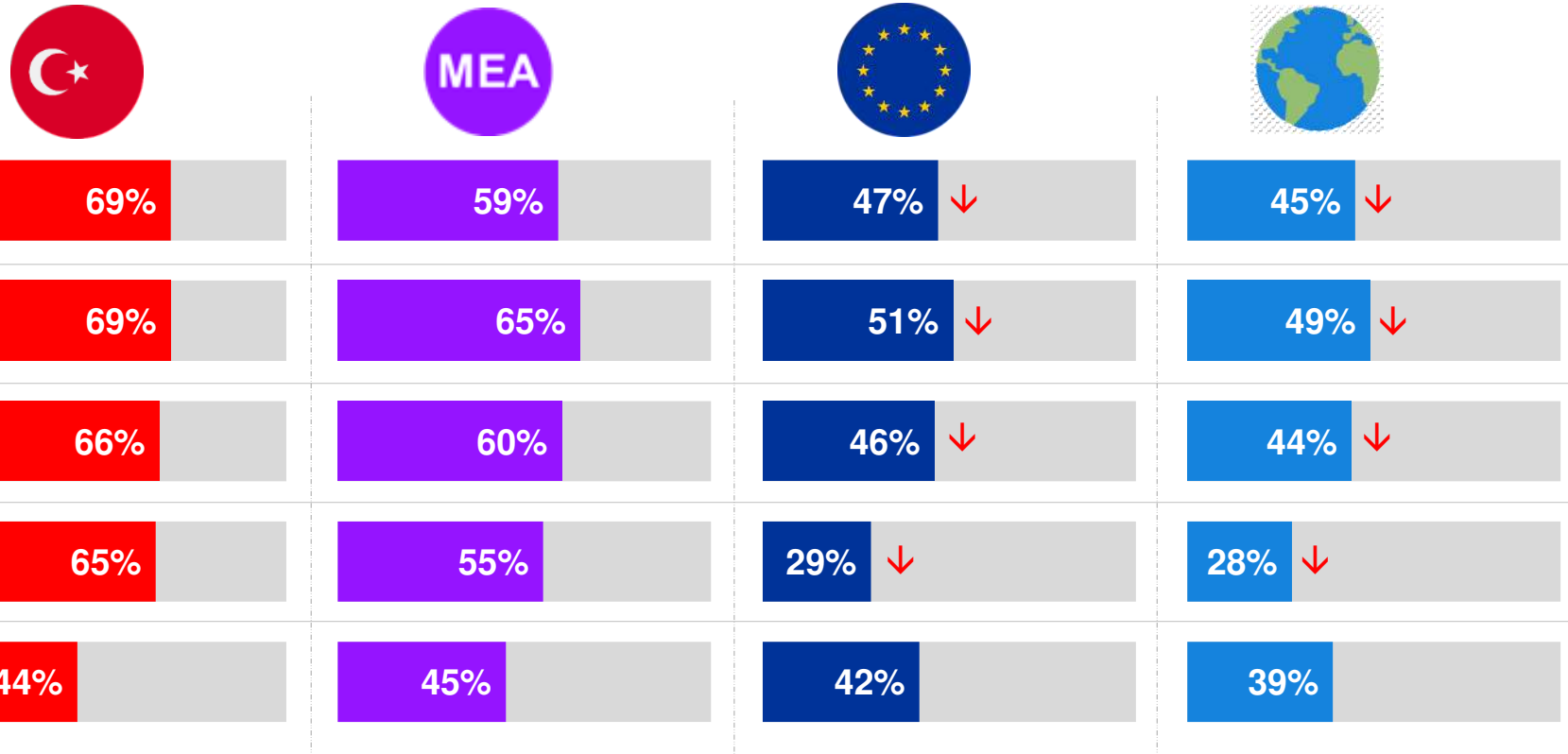
*The charts illustrate the sum of 'Well advanced' and 'Progressing well' % from a 5-point scale

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*
Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

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

Turkey reports a better Comms progress than the global trend

Generally, the interviewed marketers in Turkey claim to be confident on their organisations progress in terms of comms, more so than their counterparts from Europe or worldwide. More than 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

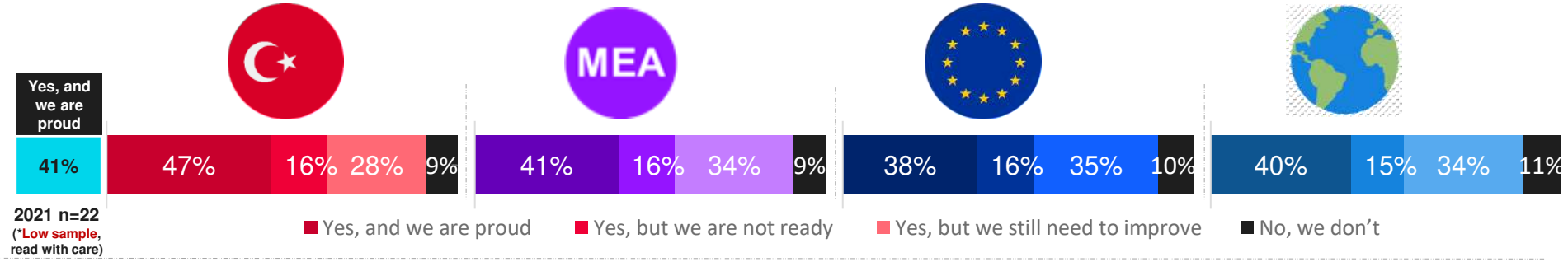
C10. How far along is your marketing organisation in the sustainability journey in terms of Communication? *(5 points scale, 1=No plans/ 5 =Well advanced)*
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

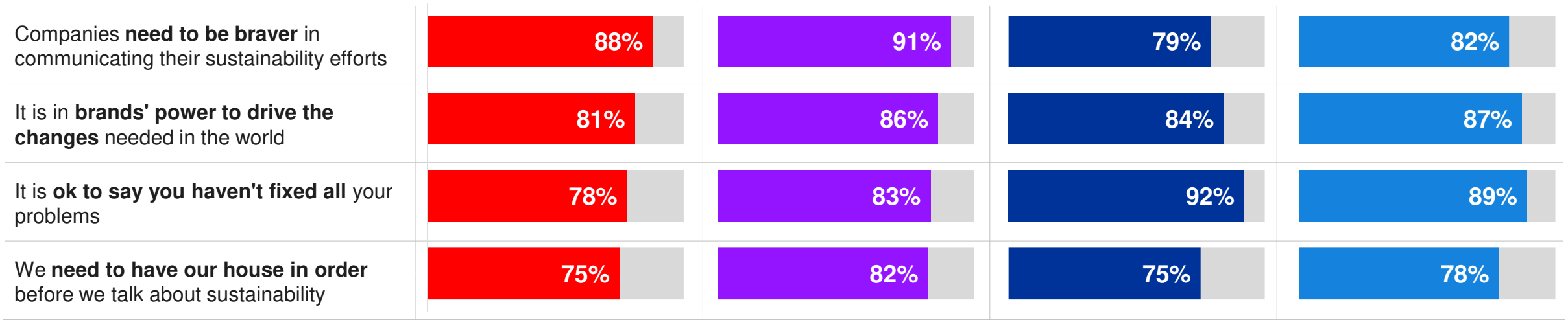
↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

Communication around sustainability

Close to 1 in 2 Turkish marketers are **proud to tell their sustainability story** today, directionally higher than their regional and global peers (showing slight increase since 2021). Most agree that companies need to be **braver in communicating their sustainability efforts**.

Do you feel your organisation has a good sustainability story to tell externally?





*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 to 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*

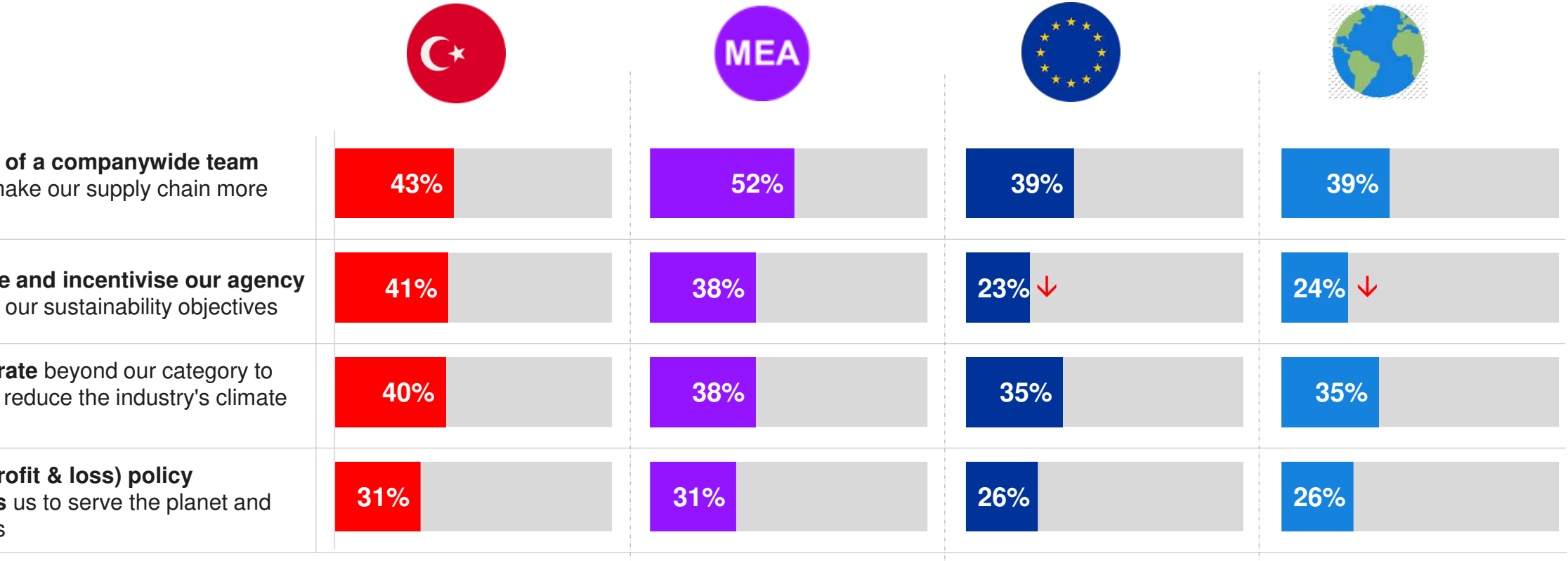
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*

Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

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

41% measure and incentivise their agency partners

Significantly **higher proportion** of Turkish marketers stated that they **measure and incentivise their agency partners** on the sustainability objectives as compared with European and worldwide benchmarks, and in line with MEA.



*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 | MEA Base: 82 | Turkey Base: 37 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, insights and case studies on how to drive growth more responsibly are top elements believed to be of help in achieving sustainability ambitions in Turkey and most other markets.

	Turkey	MEA	Europe	Global
Equip marketing teams with skills and tools to deliver a high impact sustainability strategy	52%	61%	54%	57%
Insight on **how to drive growth more responsibly** for faster progress on sustainability	48%	54%	50%	51%
Access to **sustainability and marketing case studies**	48%	46%	46%	47%
Industry wide guidance on how to **manage greenwashing and other risks**	45%	37%	43%	39%
Industry aligned way of **measuring and reporting carbon impact** for media & production	45%	48%	48%	46%
Commitment to independent measurement and benchmarking of businesses impact	42%	42%	46%	45%
Guidance on how each agency brief can drive sustainable consumption	32%	36%	35%	35%
Making the **business case** on sustainability internally	19%	31%	39% ↑	40% ↑

C5. Which of the below would help your marketing organisation to achieve their sustainability ambitions? *Multiple answer*
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Global Base: 938 | Europe Base: 577 | MEA Base: 82 | Turkey Base: 37 respondents

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

Snapshot on Marketing levers

Turkish marketers have **generally rated their organisations as more advanced** in the sustainability journey as compared with their European and global counterparts, especially for **comms, innovation** and **collaboration with the agency partners** on their sustainability objectives.

Largely aligned with the MEA results.

Cell colours highlight the higher/ lower values

% Well advanced & Progressing well

	TURKEY	MEA	EUROPE	GLOBAL
Strategy & Portfolio				
We have a good understanding of the broader value chain	69%	63%	56%	54%
Our brand's contribution to the planet's well-being is clearly stated	60%	52%	47%	45%
Our brand priorities drive sustainable action	57%	58%	46%	46%
We prioritize sustainable impact alongside financial gain in decision making	46%	49%	40%	39%
Innovation				
We give emphasis to radical innovation to change the category rules/invent new business models	50%	46%	28% ↓	30% ↓
We innovate to transform the entire portfolio versus an adjacent sustainable portfolio	38%	39%	35%	33%
We take risks and experiment to unlock transformative change	38%	45%	31%	33%
Measurement				
We have a trusted approach to measure the impact of our actions	42%	48%	32%	34%
We consistently consider the impact of our investment decisions on the planet	42%	47%	35%	35%
We prioritise long-term sustainable impact over short-term financial gain in decision making	39%	46%	36%	35%
Environmental objectives are part of our performance appraisal and bonus scheme	30%	35%	23%	26%
Communication				
Good understanding and vision of what sustainable living looks like in our categories	69%	59%	47% ↓	45% ↓
Our communications are based on robust evidence in line with regulations	69%	65%	51% ↓	49% ↓
Normalise sustainable behaviour and lifestyle in communication	66%	60%	46% ↓	44% ↓
Sustainability impact and KPIs are an integrated part of every communication brief and evaluation	65%	55%	29% ↓	28% ↓
Environmental claims are based on the full lifecycle of our products/business	44%	45%	42%	39%
Partnership & Collaboration				
We are part of a companywide team seeking to make our supply chain more sustainable	43%	52%	39%	39%
We measure and incentivise our agency partners on our sustainability objectives	41%	38%	23% ↓	24% ↓
We collaborate beyond our category to dramatically reduce the industry's climate impact	40%	38%	35%	35%
Our P&L (profit & loss) policy incentivises us to serve the planet and stakeholders	31%	31%	26%	26%

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*

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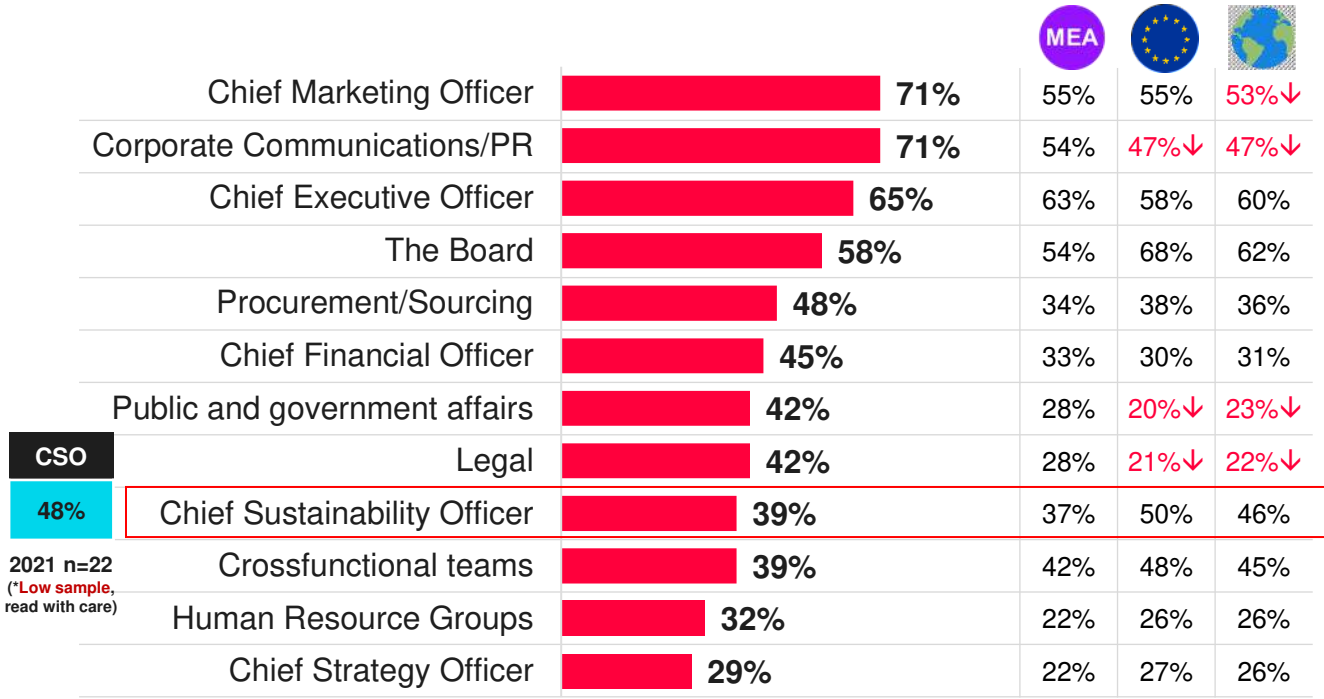
↑ ↓ Arrows show significant higher/ lower difference at 95% confidence level

4. Sustainability leadership

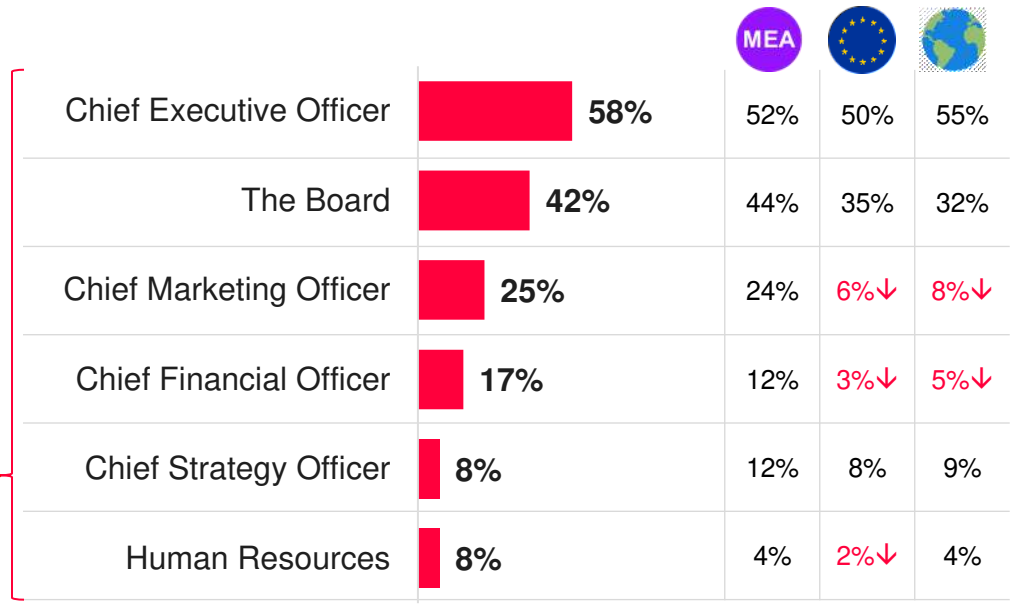
Defining the sustainability strategy

The main roles involved in designing and shaping the sustainability strategy in Turkey are the **Chief Marketing Officer and Corporate Communications**. 2 out of 5 indicated to have a Chief Sustainability Officer, mostly reporting directly to the CEO or the Board.

Who is involved in designing the sustainability strategy?



Who does the Chief Sustainability Officer report into*?



*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 | MEA Base: 82 | Turkey Base: 37 respondents

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

Thoughts on improving the sustainability strategy

01 Embed sustainability as an KPI, besides sales and marketing goals

02 Increase budget allocation for sustainability

03 Encourage partnership which focus on sustainability goals

04 Include it in corporate responsibility/ brands should be responsible for their sustainability

05 Measure effect/ impact of climate

In Turkey marketers' words…

"I think this subject is critical. Companies do also have corporate social responsibility activities, that may not align directly with sustainability objectives. After this alignment is done (which Social Responsibility is linked with what sustainability objectives must be determined), this subject can only be managed by those 2 departments only. It is for preventing other marketing departments to come up with ideas, connecting to ONG's on their own, that does not relate with the company's prioritized strategies on sustainability. This might be a good start." (PR/Comms, National role)

"In marketing, there must be a communication and CRM budget for each sustainable product. The marketing team needs to share information and data describing the contribution they have made to users of the product through an application. The user should invite their friends to the ecosystem through this application and an environment should be presented where they can contribute, ideas and awareness about sustainability. A team should follow and manage the comments, referrals in this application." (Marketing, National role)

"Change the building we work in to a sustainable one in order to remind ourselves everyday to make sustainability our prioritization." (Marketing, Global role)

"I would add items related to sustainability to existing sales and marketing goals." (Marketing, National role)

"Building a purposeful campaign." (Marketing, National role)

F1. If you could make one big change in your organisation to help make marketing part of the solution to the climate crisis, what would you do? *Open ended answer*
Source: 'Sustainable Marketing 2030' in partnership with Kantar Sustainable Transformation Practice, *January-February 2023*
Turkey Base: 37 respondents

5. Key learnings

Executive Summary

1. Setting the sustainability context:

- ✓ Turkish marketers generally agree that **brands should be responsible**, and that **marketing function can make a difference** in the sustainability journey. Most feel that there's an **imperative need to be brave and experiment** to deliver transformative change.

2. Progress on the sustainability journey:

- ✓ Sustainability in Turkey is progressing well - **75% are taking actions** towards the UN's SDGs. One third claim they have the relevant goals fully embedded into their organisation strategy.
- ✓ Senior marketers in Turkey are **confident on the internal engagement** – and need to **focus on measuring sustainability efforts and innovation in sustainability.**
- ✓ Main challenges in the sustainability space refer to **lack of P&L policy** that treats equally the planet and profit and **difficulty to organize & implement cross-industries initiatives**. When it comes to opportunities, consumer education and innovation stand out.

3. Sustainability performance across marketing levers

- ✓ Turkish marketers have generally rated their organisations as **more advanced in the sustainability journey** as compared to their European and global counterparts, especially for **comms, innovation and collaboration** with the agency partners on their sustainability objectives. Largely aligned with the MEA outcome.
- ✓ 57% 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, insights and case studies** on how to drive growth more responsibly are top elements believed will help in achieving sustainability ambitions in Turkey and most other markets.

4. Sustainability leadership:

- ✓ The main roles involved in designing and shaping the sustainability strategy in Turkey are Chief Marketing Officer and Corporate Communications. 2 out of 5 indicated to have a Chief Sustainability Officer, mostly reporting directly to the CEO or the Board.

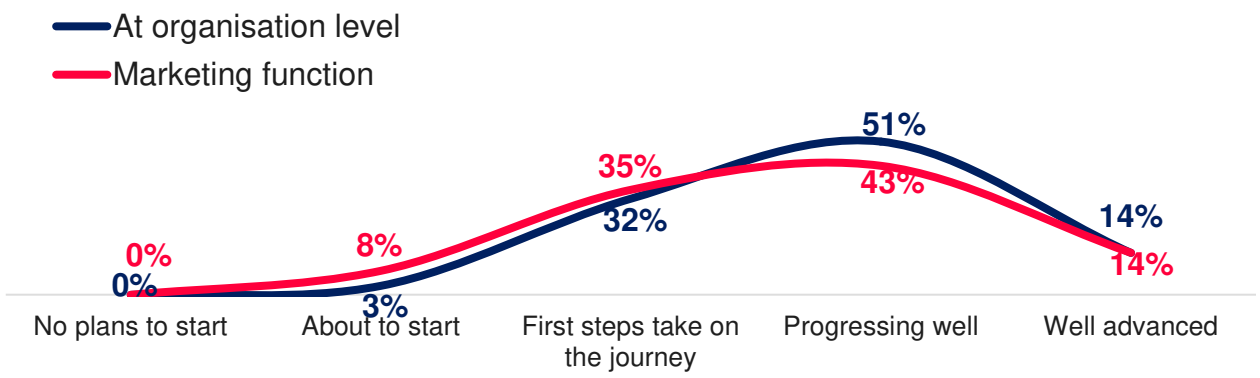
Directional improvement noticed since 2021 in **setting sustainability as a KPI** on marketing dashboards and **embedding the relevant goals** into own strategy

Executive Summary

Turkey

Aware & taking action for sustainability goals 75%

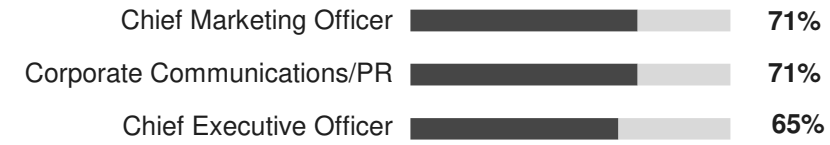
Organisational and marketing sustainability journey maturity



Thoughts on improving the sustainability strategy

01	Embed sustainability as an KPI, besides sales and marketing goals
02	Increase budget allocation for sustainability
03	Encourage partnership which focus on sustainability goals
04	Include it in corporate responsibility/ brands should be responsible for their sustainability
05	Measure effect/ impact on climate

Main responsible roles for shaping the sustainability strategy



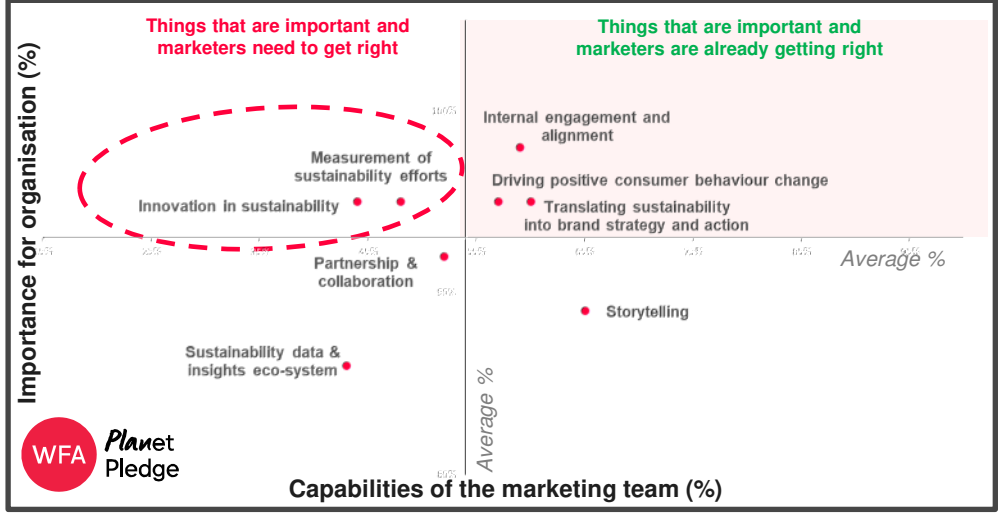
Main Opportunities

- 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
- Difficulty to organize and implement cross-industry initiatives
- Internal mindset that sustainable solutions are more costly

Marketing and Sustainability - Gap analysis



Progress on sustainability journey – Most advanced

- ✓ We have a good understanding of the broader value chain (69%)
- ✓ We give emphasis to radical innovation to change the category rules/invent new business models (50%)
- ✓ We have a trusted approach to measure the impact of our actions (42%)
- ✓ Good understanding and vision of what sustainable living looks like in our categories (69%)
- ✓ We are part of a companywide team seeking to make our supply chain more sustainable (43%)

Progress on sustainability journey – Least advanced

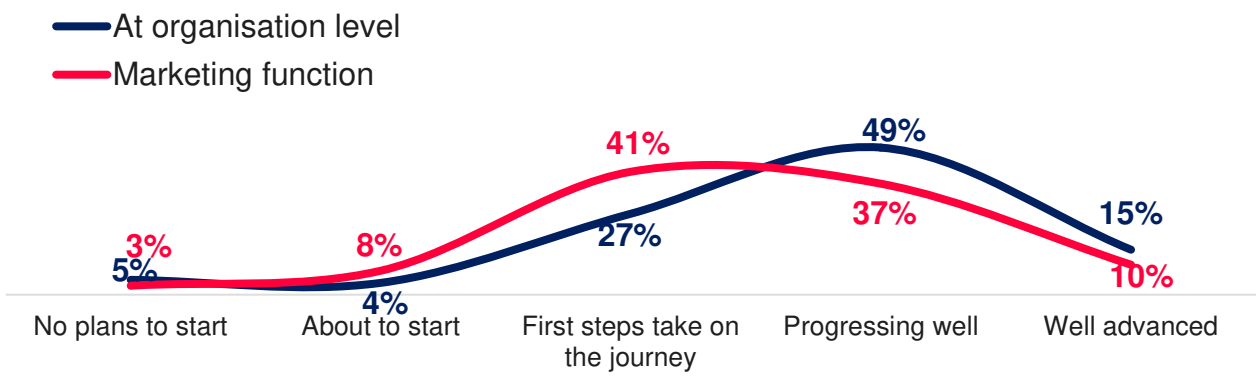
- ➢ We prioritize sustainable impact alongside financial gain in decision making (46%)
- ➢ We take risks and experiment to unlock transformative change (38%)
- ➢ Environmental objectives are part of our performance appraisal and bonus scheme (30%)
- ➢ Environmental claims are based on the full lifecycle of our products/business (44%)
- ➢ Our P&L (profit & loss) policy incentivises us to serve the planet and stakeholders (31%)

Executive Summary

Middle East and Africa

Aware & taking action for sustainability goals 76%

Organisational and marketing sustainability journey maturity



Thoughts on improving the sustainability strategy

01	Create/ incorporate sustainability/ climate goals
02	Embed sustainability as an KPI, besides sales and marketing goals
03	Involve marketing in the sustainability process
04	Provide training/ education to consumers/ internally
05	Communicate/ spread awareness

Main responsible roles for shaping the sustainability strategy

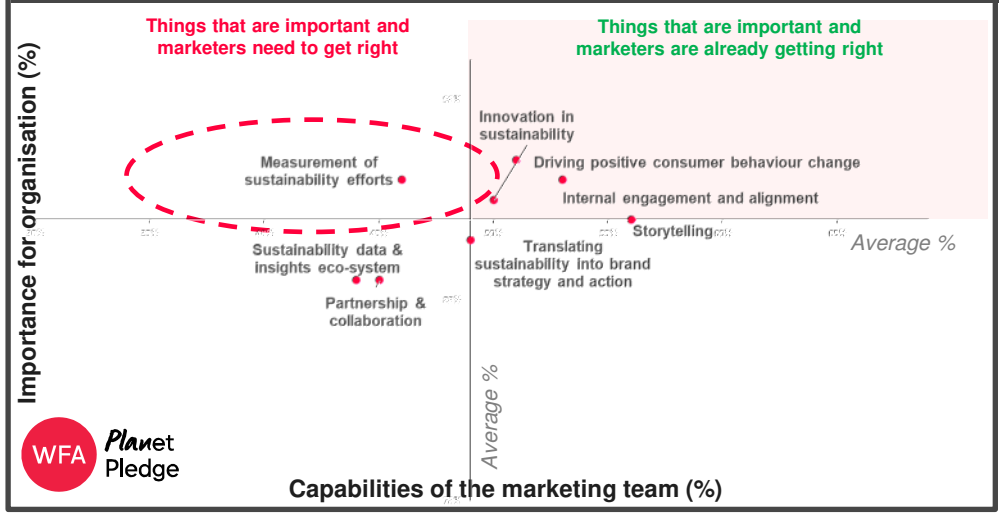
Main Opportunities

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

Main Challenges

- Marketing's knowledge and skills gap on sustainability
- Lack of allocated internal resources
- Internal mindset that sustainable solutions will be more costly than existing ones

Marketing and Sustainability - Gap analysis



Progress on sustainability journey – Most advanced

- ✓ We have a good understanding of the broader value chain (63%)
- ✓ We give emphasis to radical innovation to change the category rules/invent new business models (46%)
- ✓ We have a trusted approach to measure the impact of our actions (48%)
- ✓ Our communications are based on robust evidence in line with regulations (65%)
- ✓ We are part of a companywide team seeking to make our supply chain more sustainable (52%)

Progress on sustainability journey – Least advanced

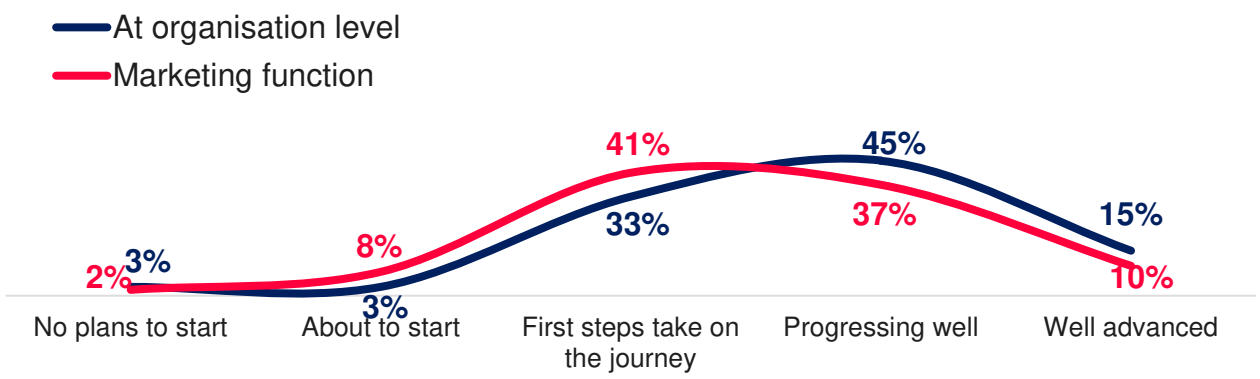
- We prioritize sustainable impact alongside financial gain in decision making (49%)
- We innovate to transform the entire portfolio versus an adjacent sustainable portfolio (39%)
- Environmental objectives are part of our performance appraisal and bonus scheme (35%)
- Environmental claims are based on the full lifecycle of our products/business (45%)
- Our P&L (profit & loss) policy incentivises us to serve the planet and stakeholders (31%)

Executive Summary

Europe

Aware & taking action for sustainability goals 77%

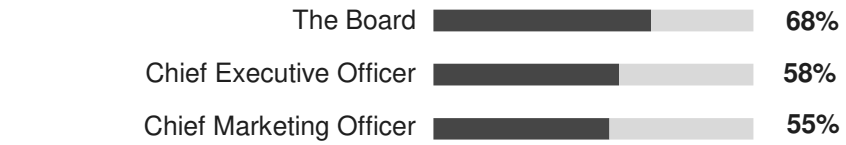
Organisational and marketing sustainability journey maturity



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 on climate
05	Embed sustainability as an KPI, besides sales and marketing goals

Main responsible roles for shaping the sustainability strategy



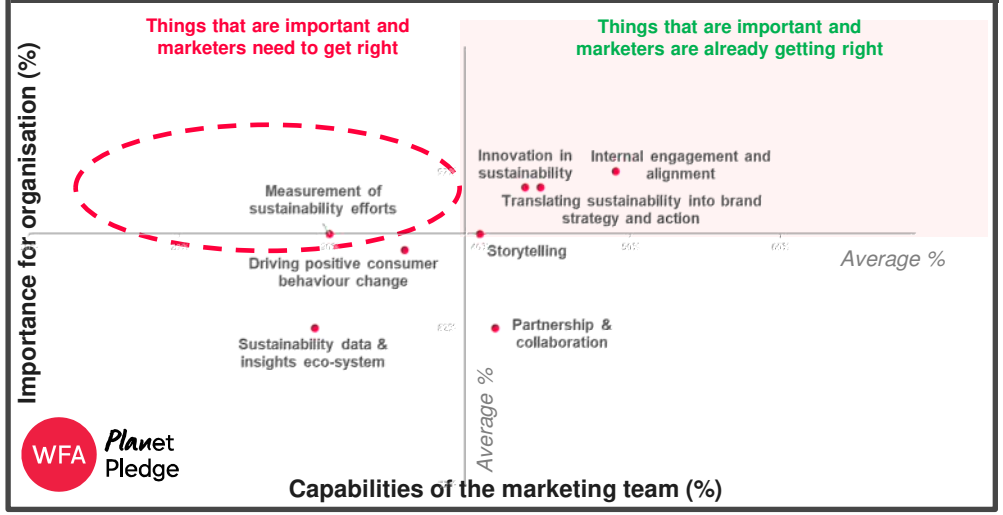
Main Opportunities

- 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

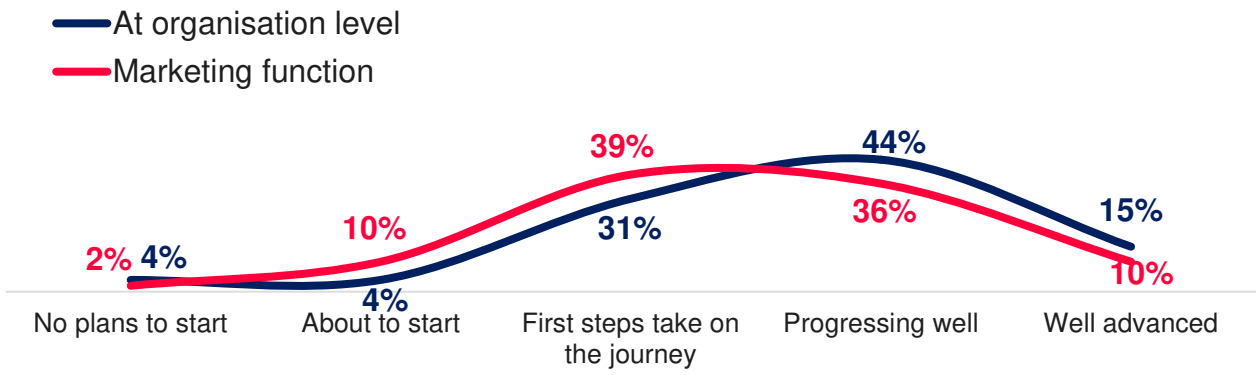
- We prioritize sustainable impact alongside financial gain in decision making (40%)
- We give emphasis to radical innovation to change the category rules/invent new business models (28%)
- Environmental objectives are part of our performance appraisal and bonus scheme (23%)
- Sustainability impact and KPIs are an integrated part of every communication brief and evaluation (29%)
- We measure and incentivise our agency partners on our sustainability objectives (23%)

Executive Summary

Global

Aware & taking action for sustainability goals 74%

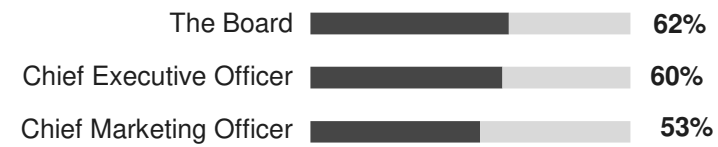
Organisational and marketing sustainability journey maturity



Thoughts on improving the sustainability strategy

01	Create/ incorporate sustainability/ climate goals
02	Provide training/ education to consumers/ internally
03	Communicate/ spread awareness
04	Embed sustainability as an KPI, besides sales and marketing goals
05	Measure effect /impact on climate

Main responsible roles for shaping the sustainability strategy



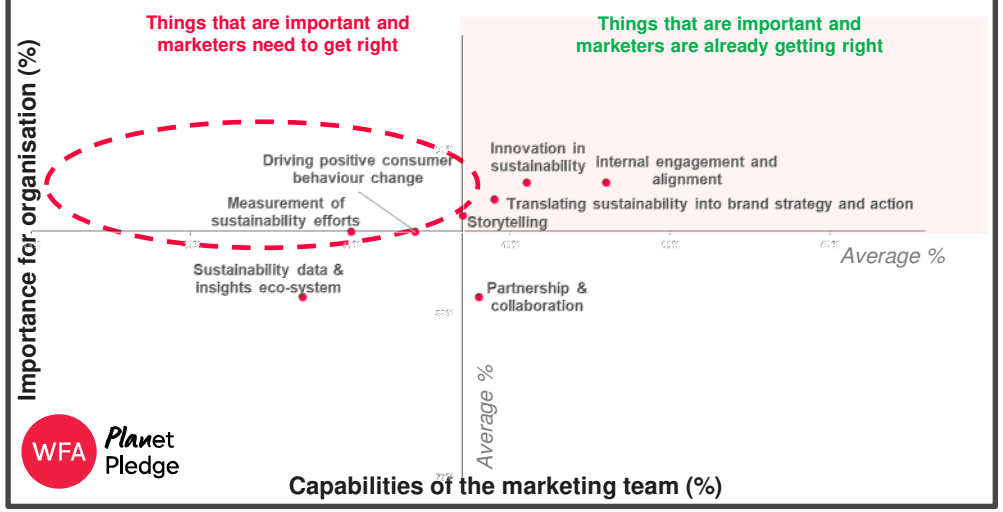
Main Opportunities

- 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

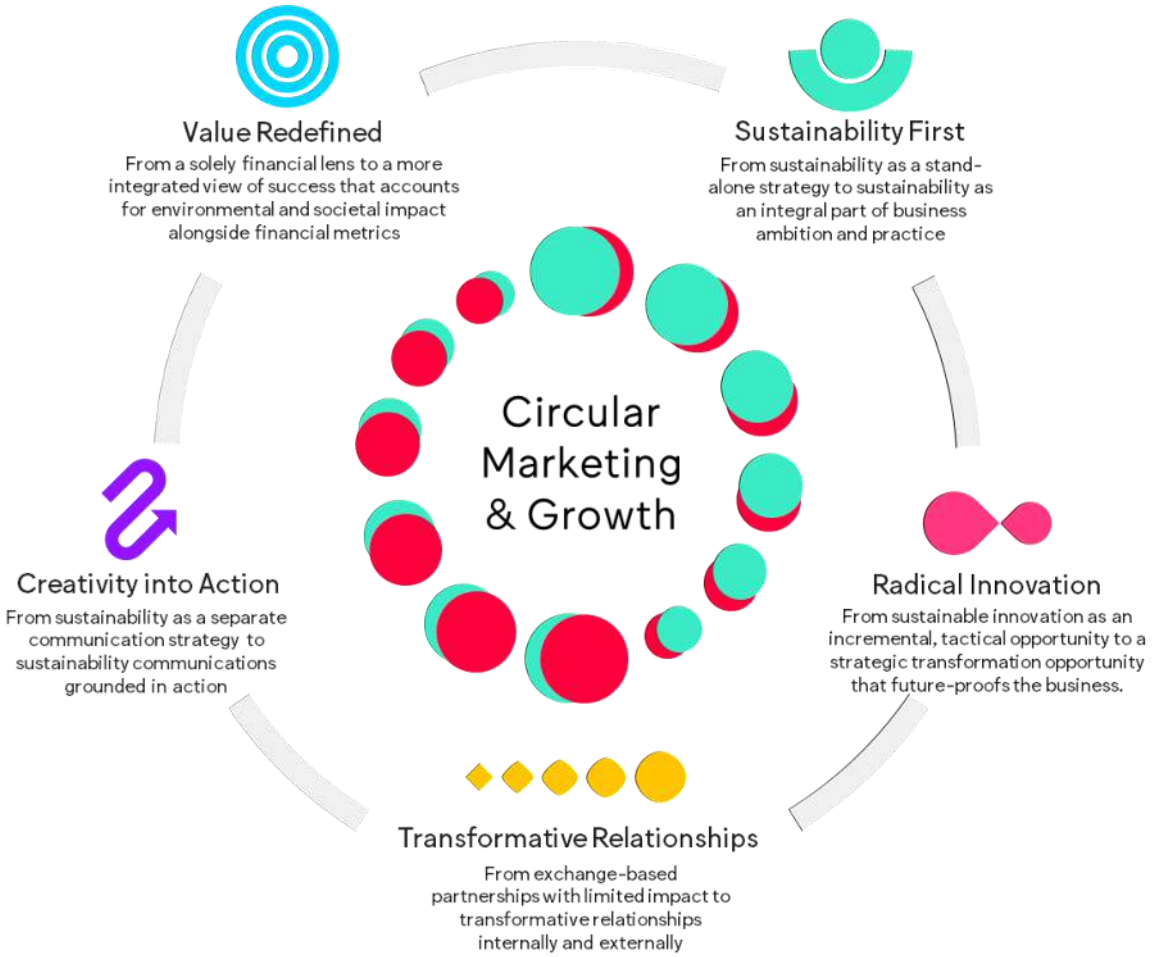


Progress on sustainability journey – Most advanced

- ✓ 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%)
- Environmental objectives are part of our performance appraisal and bonus scheme (26%)
- Sustainability impact and KPIs are an integrated part of every communication brief and evaluation (28%)
- We measure and incentivise our agency partners on our sustainability objectives (24%)



THANK YOU!

Keen to learn more?
wfanet.org/planet-pledge

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