

# The state of **sustainability.**

Emily Hall  
*Content Marketing Manager*  
Relative Insight





# Sustainability.

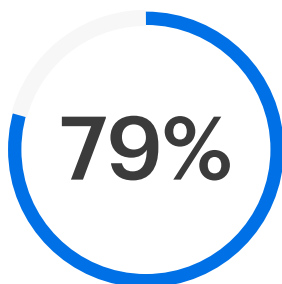
noun.

- .01 the quality of being able to continue over a period of time.
- .02 the quality of causing little or no damage to the environment and therefore able to continue for a long time.

# The challenge.

## Leading the conversation

As the international focus on sustainability moves firmly into the mainstream, brands and agencies are not only required to adopt sustainable practices and behaviours, but also to carefully and **meaningfully articulate what they are doing**. And more importantly, explain why.



79% of consumers are adapting their purchase preferences to reflect environmental impact.



## Having no opinion is often as damaging for brands than having the wrong opinion.

We understand that this is extremely complicated. Especially in a time when having no opinion is often as damaging for brands than having the wrong opinion. But the conversation around sustainability is evolving faster than ever before.

**Consumers now understand that they can play a role in the solution.** Sustainability is a priority on the customer's agenda with 79% of consumers<sup>1</sup> adapting their purchase preferences to reflect social responsibility, inclusiveness, and environmental impact. It is therefore becoming increasingly important to be aware of the language businesses use, and how they reflect their values clearly throughout messaging and corporate communications.

**Vitaly, we must all remember that when it comes to the planet, doing the right thing is paramount.** But if you're moving mountains to do so, let's make sure you're using the right words to explain why.

# The language of sustainability.

The concept of sustainability is rooted in the language of social and environmental responsibility. This means that **the way organisations speak about sustainability matters**: from the language they use to define their approach to the way they are perceived by customers and investors, as well as communicating to internal staff what they do.

## Understanding sustainability.



**“Unsustainable production, consumption and business practices persist, and the devastating ensuing environmental and social justice impacts are well documented.**

As sustainability becomes more mainstream people understand some of its complexities, but they want brands to do the right thing by people and the planet, and to make it easy for them to understand what it means when they say they are sustainable.”

**Natascha Radclyffe-Thomas**  
Professor of Marketing and Sustainable Business  
British School of Fashion | GCU London

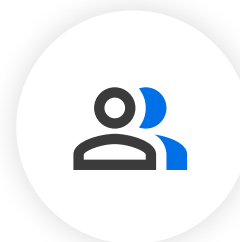
## The three spheres of sustainability:



Economy

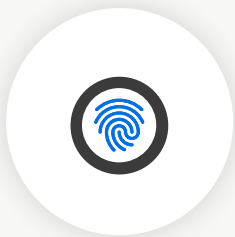


Environment



Society

However, many organisations struggle to find an authentic voice that is personal to their brand while conveying their sustainability goals. Tom Tapper, Co-founder and CEO of creative agency *Nice and Serious*, recently explored this idea in his article *Net Zero is Nonsense*.<sup>2</sup>



Speak in your unique and authentic voice

“Brands often default to a cautious, scientific tone of voice - perhaps out of fear of saying the wrong thing and being accused of *greenwashing*.”

But if you’ve backed up your commitments with serious action, it’s time to speak up, speak with confidence and, importantly, speak in your own tone of voice. It sounds a lot more authentic.”

**Tom Tapper** | Co-founder and CEO | Nice and Serious

# The solution.



## How can brands find their own voice?

**This is where Relative Insight comes in.**

Relative Insight uses language comparison to analyse qualitative data at scale, helping you to understand how an audience, brand or organisation talk. Relative Insight’s technology allows organisations to make smarter, more informed decisions around sustainability.

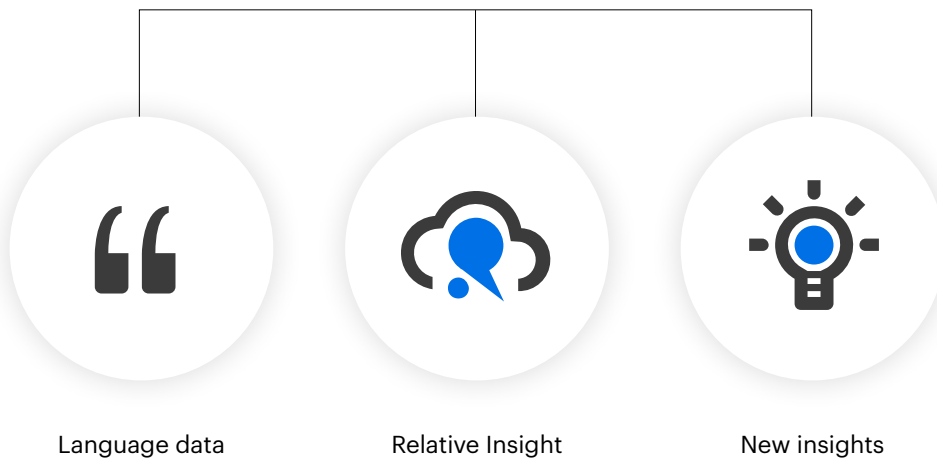
We understand the importance of staying true to your values, while resonating with audiences and not being compliant with a rapidly shifting societal narrative. The unique insights that our comparative methodology generates enable you to **craft personalised messaging around sustainability**, that is accurate and authentic, resonant and relevant.

<sup>2</sup>(Tapper 2021)

## How does Relative Insight work?

Qualitative data is one of the most valuable sources of business intelligence, but in many cases it remains under-utilised. This is often because many businesses lack the resource to properly analyse their language data.

Through comparison, **Relative Insight** makes sense of unstructured, qualitative data sifting through the building blocks of language – the *ifs*, *buts*, *hows* - to leave you with the interesting bits. The linguistic nuances that illustrate what your competitors are saying, or how your audience really *thinks* and *feels*.



## The five stages of a project.



A project with **Relative Insight** typically focuses on an overarching business problem or client brief. Projects are composed of questions, each of which is linked to one or more specific comparisons. While the range of use cases for **Relative Insight** is expansive, all projects generally follow the same five stages: *questions*, *data*, *comparison*, *insights* and *actions*.



## .01 Questions

Questions are used to set the parameters of your research, defining who and what you are interested in learning about. Every question must correspond to one or more specific comparisons.



## .02 Data

Relative Insight can work with any source of language data. Once you have sourced your data, you upload it to the platform. The split and combine functions enable you to slice-and-dice your data to prepare it for comparison.



## .03 Comparison

After uploading data, the platform will perform a language comparison analysis, producing an easy-to-navigate output that highlights the differences and similarities across *topics, phrases, words, grammar* and *emotional* categories between two or more language assets.



## .04 Unique insights

From the analysis, you can derive powerful linguistic insights that explain how an audience, brand or competitor is talking and what language makes them unique or similar.



## .05 Real world action

Insights take on value when they are used to drive action. Language comparison can highlight tangible areas of improvement to businesses, that will transform how you think and the way you approach decision-making.

# What can we uncover?



## Campaign effectiveness

Analyse how a target audience talks *before*, *during* and *after* an activation to measure the effectiveness of a campaign and understand how conversation and awareness has changed because of it.



## Competitor analysis

Analyse the differences in the way you talk in comparison to similar brands and organisations. Compare the brand messaging of your competitors to understand how they communicate their sustainability efforts.



## Theme tracking

Conduct a deep-dive analysis into how people talk about themes and topics around sustainability. Split data by *time stamp*, *location* or *demographic* to run multiple comparisons.





## Demographic insights

Understand how any audience segment speaks about matters of sustainability in comparison to others.

Identify the linguistic nuances unique to each demographic to create resonating communications and defined buyer personas.



## Media & channel analysis

Analyse the words used in media coverage around the topic of sustainability, as well as mentions of your organisation.

Gain a deeper understanding of societal and political issues around sustainability that are relevant to your work and understand how different channels attract different conversations.

## Data sources we can use:



Forums & online communities



Blogs & news



Social listening data



Focus group transcripts



Sustainability reports



Website copy



Media coverage



Open-ended survey results

Case study 01: Tracking a theme over time

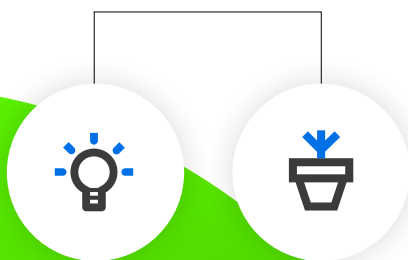
# How has the **conversation** around climate **evolved** over the past ten years?

## Process

With the advancement of science and rise in climate activism, **the conversation on sustainability is constantly evolving**. Therefore, analysing the conversation over time brings to light the linguistic changes of society's narrative.

Looking specifically at sustainability and scientific forums, we compared conversations across a ten-year period to understand how the conversation has progressed.

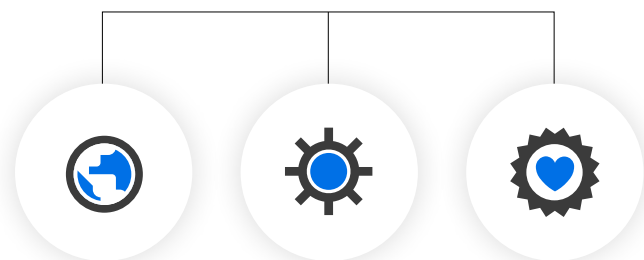
2010



Alternative energy

Sustainable agriculture

2020



Carrying capacity

Climate change

Emotional response

## 2010-2012

**Alternative energy 5x**  
**Sustainable agriculture ∞**

Although the topic of *alternative energy* and *sustainable agriculture* was more prevalent in earlier conversations, this could imply that the academic discussion of clean energy and sustainability has moved on, with increased mainstream adoption of alternative energy sources and sustainable practices.

## 2018-2020

**The world's carrying capacity 16.5x**  
**Climate change 3.2x**  
**Emotional response 1.8x**

The current conversation reflects a substantial shift away from the intricacies of alternative energy to a much greater focus on what *climate change*, and the unsustainable consumption of resources, means for the future of the planet.

The increased usage of the term *climate change* suggests that conversation has pulled away from the phrase '*global warming*'. A phrase which has long been criticised for its failure to capture the full breadth of changes that can be attributed to carbon emissions. Despite advances, people remain emotional and frustrated with the pace of change on environmental issues.

## What can you do with these insights?



Align brand initiatives (*advertising and philanthropy*) with the increased emotional response to climate issues and the urgent need for change.



Focus on creating mindfulness around personal consumption habits, including being aware of how your products are consumed and where there is room for improvement.



Adapt sustainability communications to reflect current scientific and expert language.



Say "*climate change*" not global warming to demonstrate your ability to keep up with the current vernacular.

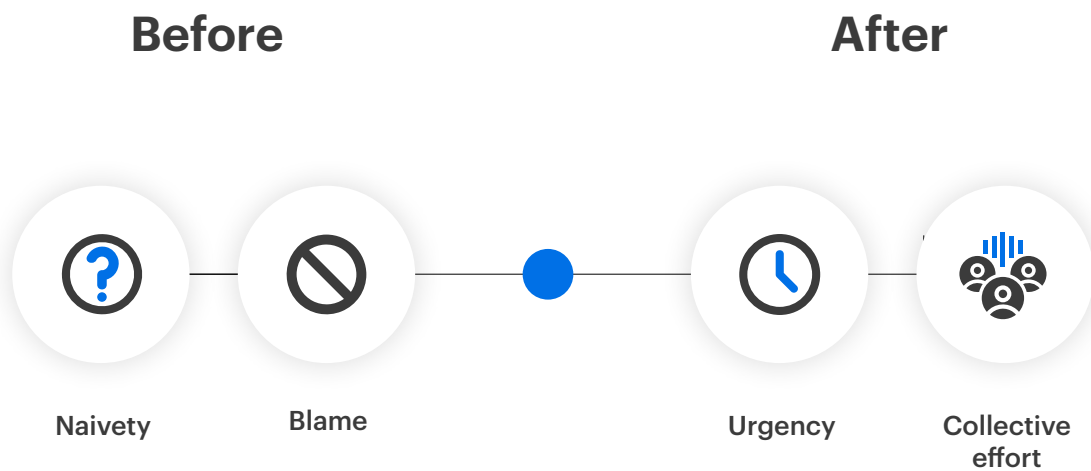
Case study 02: Measuring campaign effectiveness

# How much of an impact did **Greta Thunberg** have on raising awareness for **climate change**?

## Process

Greta Thunberg inspired millions of young people to join her “*Skolstrejk för klimatet*” (school strike for climate) protests. The protests aimed to pressure governments to **deliver an urgent actionable agenda** in the fight against climate change.

We analysed social listening data before and after Greta Thunberg’s first climate strike (August 2018) to measure campaign effectiveness amongst young people on Twitter.



## Pre-Greta

### Naivety 1.4x

*What's the worst that could happen?*

### Blame 1.8x

*Blame it on the politicians*

Prior to Greta, young people were almost twice as likely to believe that change would happen from top-down action, i.e. high-level *political* action would take precedence, and citizen activism would follow.

Thus, as individual actors, young people did not consider themselves as pivotal in the agenda for change. Nor did they understand how grave the situation was.

## Post-Greta

### Urgency 6.2x

*It's now or never*

### Collective effort 8.7x

*We're all in this together*

Comparatively, Greta Thunberg's has activism influenced young people to speak about issues of climate change, who are now 6.2x more likely to use urgent verbatim such as *tackle* and *act now*.

Today, young people talk about taking actions against climate change in a *collaborative* manner. Climate change is a shared burden that requires collective, community effort.

## What can you do with these insights?



When addressing consumers, display urgency and the need for a collective effort.



To be viewed as a leader in sustainability and truly engage in these discussions, be open to critical feedback and willing to adapt quickly.



Be willing to take political stance on controversial issues as a way of authenticating your sustainability goals.



Engage with new generation of climate activists as a way of remaining relevant and demonstrating commitment to environmental progress.

Case study 03: Geographical comparison

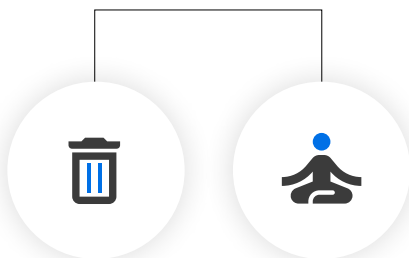
# How do people on the **US coast** talk about **#PlasticPollution** compared to those living in non-coastal regions?

## Process

Analysing data from the coastal regions to non-coastal regions in the United States, to understand how different audiences **talk about plastic pollution across the country**.

In honour of Earth Day 2020, our client Sommer Consulting set out to analyse all *#plasticpollution* tweets sent in 2019. Specifically, comparing people in different areas of the United States.

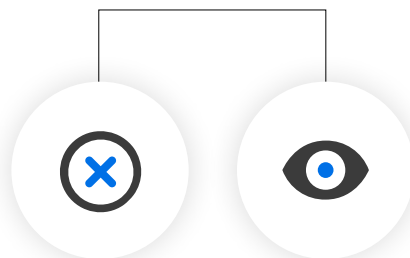
### Coasts



Plastic  
pollution

Human  
health

### Non-Coasts



Negative evaluation  
of companies

Paying  
attention

## Coasts

### ***Impact of plastic pollution on the oceans*** ***Human health***

Americans living on the coasts discussed the impact of plastic pollution specifically on *ocean* and *marine life*, showing that where people live bears relevance to how they talk about a topic and what resonates with them.

The coasts are also more likely to talk about the impact of plastic pollution on *human health* and *ecosystems*.

## Non-Coasts

### ***Negative evaluation of companies*** ***Responsibility to pay attention***

In comparison, non-coastal regions in the US are more likely to talk about *careless companies* who are worsening pollution, using emotive language to express that they are *saddened* by this.

Non-Coasts say they have a *responsibility* to understand and pay attention to plastic pollution, including educating themselves on company behaviours and unsustainable plastic use.

## What can you do with these insights?



Assertively and transparently communicate sustainability initiatives to avoid being categorised as 'careless'.



Create toolkits and educational content to show the impact of plastic pollution on human health and ecosystems, and advocate for change in plastic use.



Adopt messaging that reflects the differentiated environmental concerns in different geographies e.g. *coasts* = *oceans*, *non-coasts* = *lakes, rivers*.



Address concerns regarding packaging and company plastic use, and if you're lagging in sustainable practices, change this.

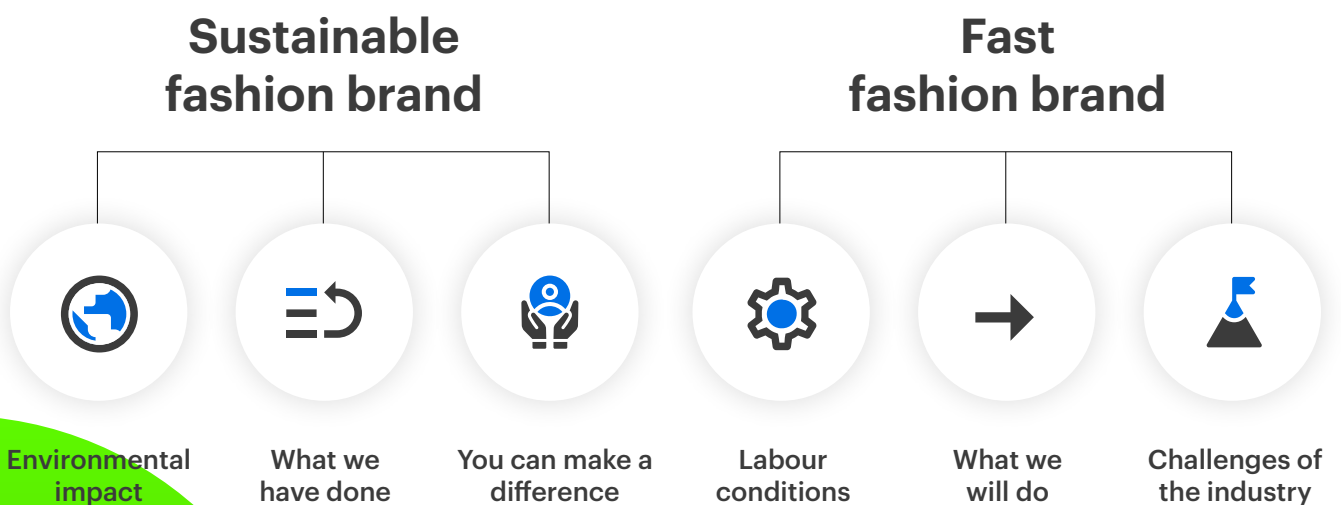
Case study 04: Brand comparison

# How do two **fashion brands** communicate their sustainable commitments?

## Process

The fashion industry accounts for around 10% of global carbon emissions, and nearly 20% of wastewater<sup>3</sup>. However, there is an increasing number of sustainable fashion brands that are entering the market, competing with established fast fashion giants and appealing to the environmentally conscious consumer.

Comparing the website copy and sustainability commitments of a self-proclaimed sustainable fashion brand against a well-known fast-fashion brand, as a means of competitor benchmarking.



<sup>3</sup>(UNECE 2018)



## Sustainable fashion brand

**Environmental impact** ∞

**What we have done** 2.9x

**You can make a difference** 3.8x

The sustainable fashion brand position themselves as a *green business* and are infinitely more likely to focus their sustainability commitments on *environmental impact* – speaking of *carbon footprint* and *pollution*.

The use of past verbs and present participles shows the continuous work that the brand *have done* and *are doing* to meet sustainable goals. The brand directly appeals to the consumer, and the change YOU can have on the planet, holding people accountable for their individual actions.

## Fast fashion brand

**Human rights and labour conditions** 5.4x

**What we will do** 1.8x

**Challenges of the industry** 5.8x

In contrast, the fast-fashion brand steers away from measuring their environmental impact and instead focus on the human aspect of sustainability talking about *human rights*, *workers* and *fair living*. Yet despite these promises, there is little evidence that the brand provides a fair living wage across its entire supply chain.

One key difference is that this brand speaks about the generic *challenges* facing the entire *fashion industry*, particularly regarding use of natural resources. Although the brand addresses these issues in their communications, an important difference is the use of modal auxiliary verbs such as *can* and *will* which suggest the brand is only in the process of improving their sustainable efforts.

## What can you do with these insights?



Communicate sustainability initiatives that are already in place, as well as future commitments. Invest in greater supply chain sustainability and be transparent on worker conditions.



Emphasise the connection between the sustainability of fast-fashion and consumer behaviour – encourage consumers to consider and adapt their buying behaviours through educational content.

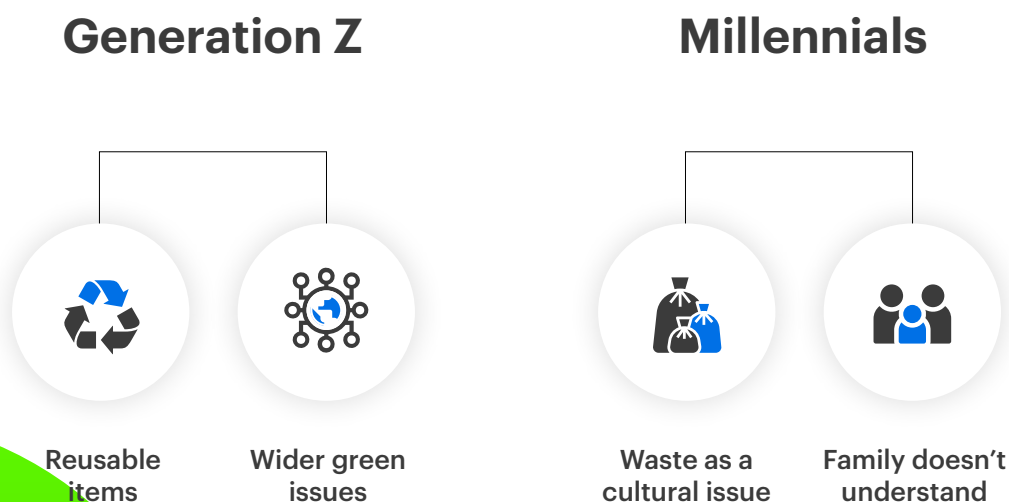
Case study 05: Demographic age comparison

# How do different generations discuss Zero Waste?

## Process

**Zero Waste** is a lifestyle choice that ultimately promotes reducing the amount of material we throw away. As such, recycling and minimising waste are becoming an important factor in the consumer purchase decision, and brands must aim to address this topic.

Analysing social listening and forum data around Zero Waste of two distinct demographics. This helps us to understand how generation Z and millennials, both of whom play a vital role in the sustainable solution, talk about the topic.



## Generation Z

**Purchasing reusable items 5x**  
**Wider green issues 5x**

Throughout their discussions of Zeron Waste, gen Z are leading the way when it comes to purchasing reusable products as a way to minimise waste, specifically in the personal hygiene space.

The conversation around Zero Waste is deeply rooted in wider green issues such as *nuclear*, *recycling* and *clean energy*. This shows the detailed level of awareness gen Z have on climate issues and what the solution may look like, in comparison to their millennial counterparts.

## Millennials

**Waste as a cultural issue 4.8x**  
**Family doesn't understand 3.6x**

Comparatively, millennials are 3.6x more likely to reference their *families* when discussing Zero Waste, claiming that older family members don't understand the Zero-Waste lifestyle.

Therefore, millennials must lead by example. Millennials also adopt an accusatory tone of voice, blaming *American culture* for being wasteful and holding strong opinions about different countries' impact.

## What can you do with these insights?



Use research to inform product development and create reusable items.



Target families with marketing campaigns that demystify common misconceptions about environmental issues.



Focus comms on helping people understand the impact of their actions, both individually and collectively to diffuse blame.

# Sustainability in different age groups.

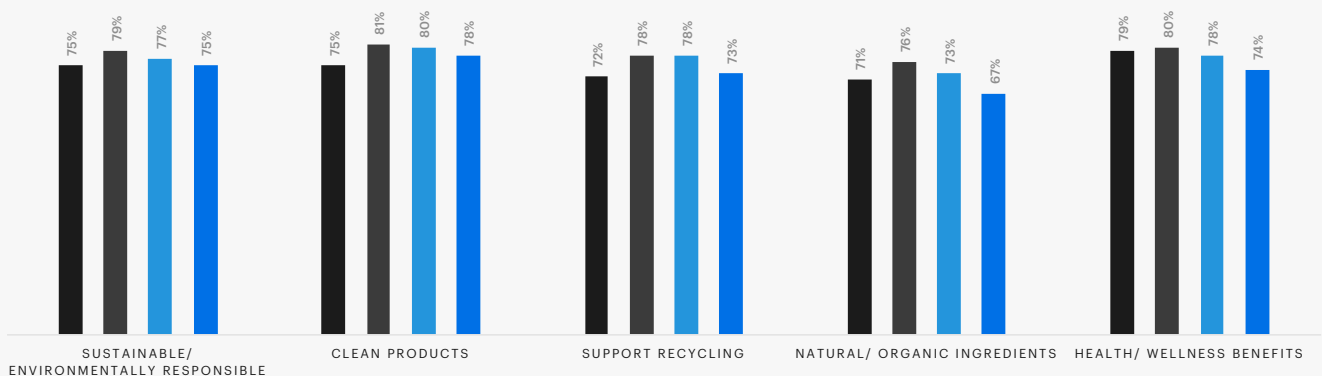
## The sustainability priorities of consumers transcend age groups

While younger generations may be leading the charge in environmental advocacy, what's important to note is that the sustainability preferences of consumers transcend age groups.

In a global consumer survey conducted by IBM, every age group indicated that sustainability, environmental responsibility, and wellness benefits are significant considerations when selecting brands.

### 01 Considerations when selecting brands<sup>4</sup>

■ GEN Z ■ MILLENNIAL ■ GEN X ■ BOOMER



<sup>4</sup>Survey of 18,980 consumers in 28 countries. Percentage of respondents declaring that these attributes are Very/Extremely/Moderately important to them (IBM Institute Value for Business 2020)

# Brands for good.

Perfection is elusive. However, the below companies are positioned at the leading edge of sustainability, adopting poignant, meaningful and articulate styles throughout their brand voice and sustainability manifestos.

## Patagonia

In 2019 Patagonia received the UN Champion of the Earth award in the category: outstanding entrepreneurial vision. Patagonia is reimagining what a fashion brand, or rather any brand, can be. Instead of encouraging people to buy their products, Patagonia question the notion of consumption and ask their consumers to buy only what they really need.

**Patagonia question the notion of consumption and ask their consumers to buy only what they really need.** Their mission statement, *“We’re in business to save our home planet”*, reflects the urgency of the climate crisis. The intrinsic values of the company embody the meaning of sustainability.

## Sustainable values



Championing fair living wages.



Investment in renewable energy.



Donating 1% of sales to environmental causes.

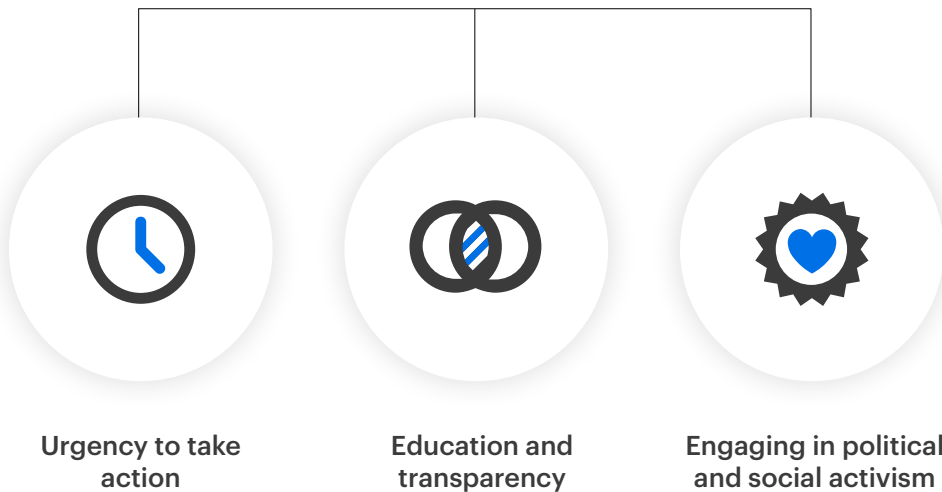


Launching a program called *“Worn Wear”* which provides significant resources for responsible care, repair, reuse, resale, and recycling at the end of a garment’s life.

## Communication

### Action

In terms of articulating their sustainability efforts, **Patagonia expresses a need for urgency and revolution across their brand messaging.** The company illustrates how they are *taking action* and *fighting* to protect our planet, whilst employing the everyday consumer to *join the movement* and *act now*.



### Transparency

The brand sheds light on the effects of climate change on specific habitats and geographical areas through educational content and short films. **This level of transparency is what's often lacking in brand communications.** It's vital that consumers have all of the facts to make their own decisions.

### Activism

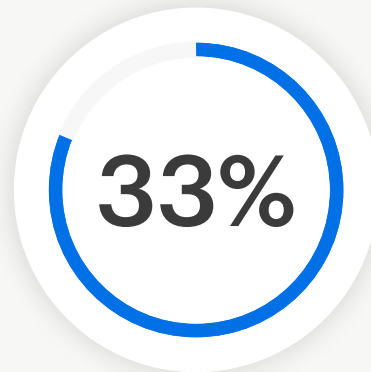
Patagonia position themselves as **standing in solidarity with climate leaders**, calling out the *Trump administration* as negatively impacting the path to *Net Zero*. In taking a political stance, Patagonia appear personal instead of an unbiased corporate machine. They speak in a confident voice which consumers can trust.

## TOMS

TOMS was created in 2006, when founder Blake Mycoskie pioneered the *One for One*® model, meaning that for every pair of TOMS bought, a child in developing country **would also receive a pair of shoes**. The simplicity of this concept led to the success of the brand, making it easy for people to understand how their own actions could have an impact.

### Sustainable values

Although TOMS have moved towards a more flexible model, committing 1/3 of profits for grassroots good to drive progress from the ground up, they remain a leader in the sustainable space. Similar to Patagonia, TOMS mission statement is *“using business to improve lives.”* Their business model provides value to the world, not just their customers.



TOMS donate around round 33% of profits to grassroots good.

### Communication

#### Giving back

While it's important that brands communicate all aspects of their sustainability agenda, TOMS do so by using **clear and resonant messaging**. Phrases such as *giving back*, *impact* and *improve lives* highlight the social values of the brand that many consumers can relate to.

#### Political action

Our analysis of TOMS brand messaging also found they use their platform to promote political action and change, **encouraging people to vote** in order to make an impact. By demonstrating a willingness to engage in political issues despite potential backlash, brands can bring attention to the need for everyone to do their part.

## Too Good To Go

### Sustainable values

Too Good To Go is an app that turns food waste into business, “creating a market place for what would normally end up in the bin”. Food waste is a global problem that Too Good To Go aims to tackle. Currently, 8% of the global greenhouse gas emissions comes from food waste. However, the app provides a sustainable solution to this, enabling wins for both retailers and consumers.

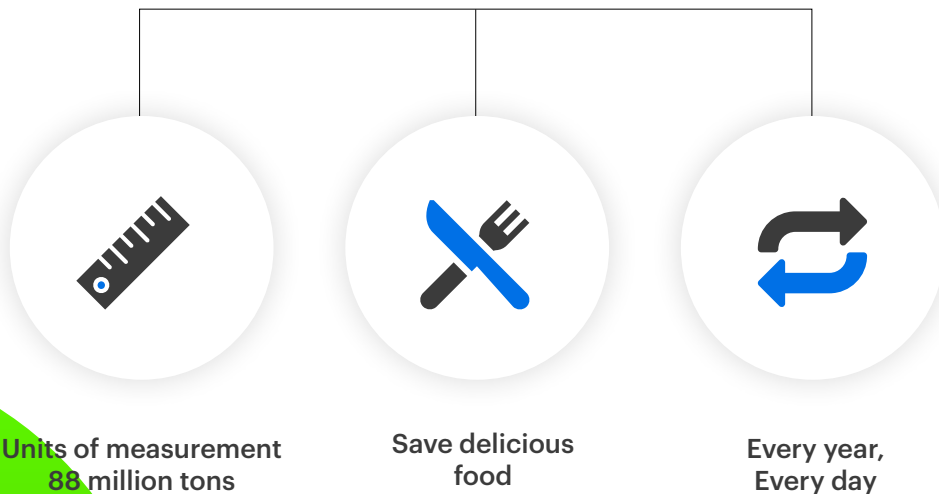
### Communication

#### Food waste cycle

Too Good To Go provides a solution to a huge, international problem. The use of temporal language such as *every year* and *every day* further **highlights the unending cycle of food waste** across the world, providing the consumer with clear facts.

#### Measurements

In their communications, the brand consistently refers to statistics and measurement such as *tons* and *kilos* to emphasise just how much food waste there is. In doing this, the brand position themselves as factual and transparent, **educating both retailers and consumers** while allowing the numbers to speak for themselves.





# Sustainable companies around the world.

There's an assumption around which countries are the leading lights in sustainability. However, there is no single rubric for assessing sustainability performance. The below map reflects one lens through which you can look at the distribution of sustainable companies across the globe.

## 02 How many sustainable companies are there in each region in 2021?<sup>5</sup>



## Corporate sustainability

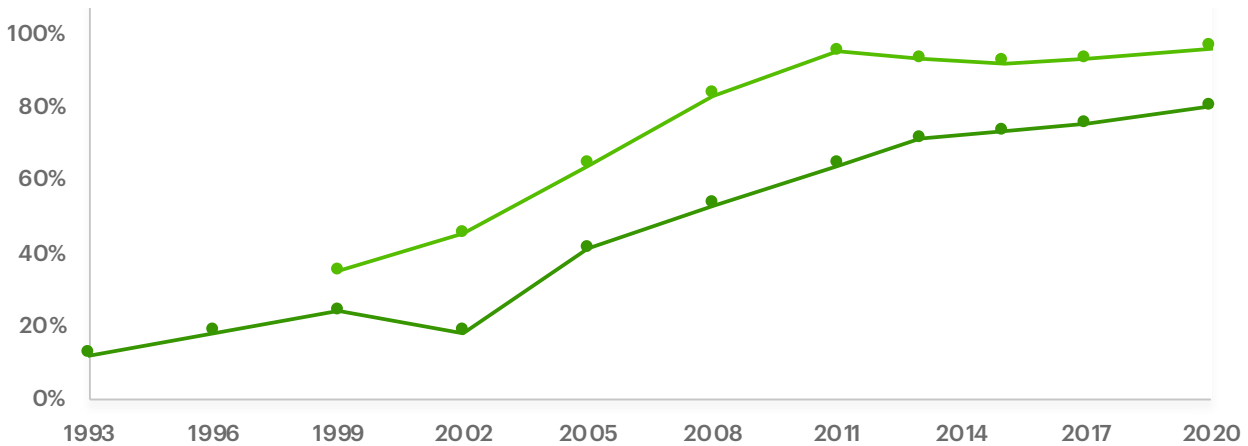
Across industries and geography, corporate sustainability programmes have emerged as an imperative tool in the fight against climate change.

The continued adoption of sustainability initiatives reflects a **shift towards the triple bottom line as mechanism for businesses to balance financial and social commitments**. This involves orienting business performance not just around profit, but also around impact on people and the planet.

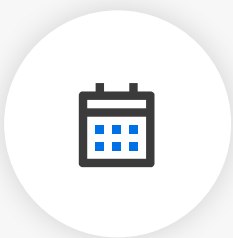
Sustainability reporting continues to grow worldwide and has seen a strong increase over the past 30 years, as shown by the graph below which highlights the percentage of N100 and G250 companies who publish sustainability reports. Such reporting mechanisms **help raise the collective standard for businesses** and invite feedback and scrutiny from experts that can drive continued progress.

## 02 Growth in global sustainability reporting rates since 1993<sup>6</sup>

● % N100 ● % G250



N100 companies: A worldwide sample of 5,200 companies, consisting of the top 100 companies across 52 countries<sup>6</sup>  
 G250 companies: The world's 250 largest companies by revenue listed in the Fortune 500 ranking of 2019<sup>6</sup>



Sustainability is part of the long term picture

*“Sustainability issues, in particular climate change, are slowly **becoming part of the long-term picture for most companies**. However, we are still not seeing enough business leaders setting a vision to focus the companies on tackling issues related to climate change...”*

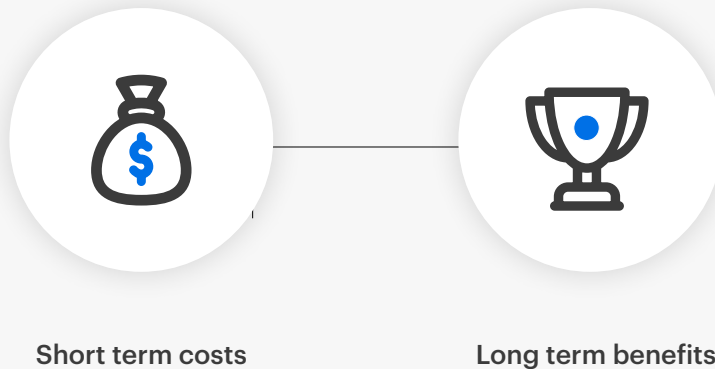
*Too many CEOs and Chairs are keeping silent on climate issues. We call this the **authenticity challenge** – the litmus test separating those who are truly ambitious about adapting their business for long-term resilience, and others who are simply paying lip service.”*

**Erika Susanto** | ESG Research Manager | Black Sun

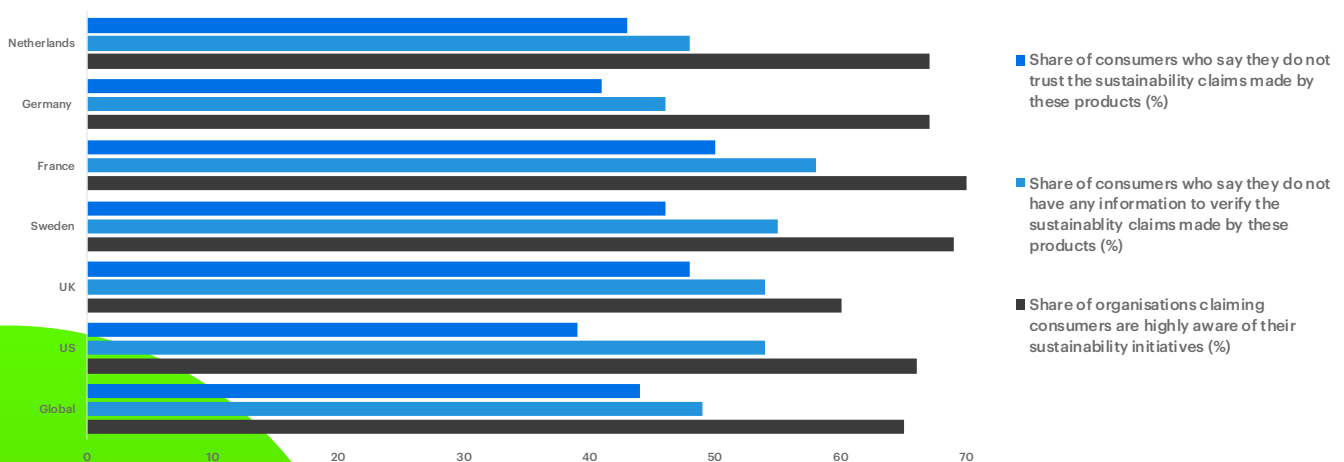
## Sustainability in the long run

As sustainability becomes an integral part of business and society, **brands and agencies must consider their environmental and social impact as well as their financial profits.** It's crucial to communicate what you are doing in terms of sustainability to hold yourself to account publicly. However, improving sustainability can involve short term costs before longer term benefits are realised.

**This means that effective communication is key in the long run for companies to be seen as industry leaders** that take their sustainability commitments seriously. Investors must continue to shift their focus away from short-term returns to enable businesses to make the necessary changes to fulfil their environmental commitments.



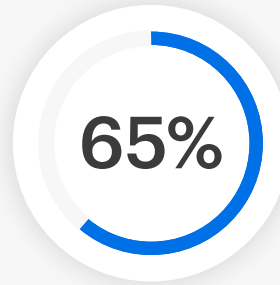
### 03 Consumers do not trust sustainability claims made by organisations<sup>7</sup>



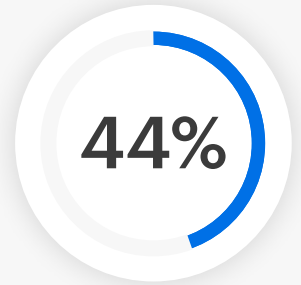
<sup>7</sup>Global survey of 7,500 and 750 executives consumers (Capgemini Research Institute 2020)

Furthermore, sustainable commitments must resonate with everyday consumers. A global report conducted by Capgemini<sup>®</sup> found that 65% of executives believe that consumers understand their organisation's sustainability initiatives. However, there is a clear crisis of trust as evidenced by 44% of consumers being sceptical about product and brand claims.

There has been a colossal increase in the amount of 'greenwash' sustainability marketing activity that has gone on without solid action being taken beneath the surface – and this has created a huge lack of consumer trust. **A balance must be struck between using simple language, accuracy of claims and building credibility.**



65% of executives believe that consumers understand their organisation's sustainability initiatives.



44% of consumers are sceptical about brand claims.

## Why language comparison?



When it comes to sustainability and climate change, **brands face the challenge of wanting to stay ahead of the curve.** To do this, there is a need to understand the sustainability discourse on a deeper level.

Unique insights emerge through Relative Insight's comparative approach to text analysis. Whether that's *understanding one demographic in comparison to another, how a conversation or opinion has changed, sophisticated competitor analysis, or measuring campaign effectiveness.*

## Real world actions

Turning these insights into real world actions is a crucial step in navigating the way to a more sustainable future. While the examined case studies in this project span various industries, there are four key actionable insights that are relevant to all brands.

# Four actionable Insights.



### .01 Communicate

Authentically communicate sustainability plans both internally and externally to establish trust and credibility.



### .02 Comparison

Educate your consumers on what buying a product from you means from an environmental standpoint.



### .03 Invest in sustainability

Demonstrate a willingness to invest in sustainable initiatives, even when that means prioritising the planet.



### .04 Learn

Be open to learning, feedback and criticism as you navigate and shift brand focus towards sustainability.

## How can Relative Insight help you?

It's essential that organisations know how to **communicate in a way that resonates with consumers** while remaining relevant, authentic, and being careful not to appear tone-deaf. There is a need for transparency regarding sustainability, and brands must drive the agenda.

The starting point needs to be a robust, organisation wide action plan. Once that's done, Relative Insight can help you **develop a communications strategy** that captures the seriousness of the environmental crisis and acknowledges the importance of these issues in a tone that resonates with your customers, investors and society more broadly.



You create the organisation  
action plan



Relative Insight helps develop a  
communication strategy

## Get in touch to see how we can help you.

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# Notes & sources.

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