NETHERLANDS

OFFICIAL REPORT 2019

SUSTAINABLE BRAND INDEX B2C

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™ B2C

Sustainable Brand Index™ is Europe's largest independent brand study focused on sustainability. The study is conducted yearly since 2011 from a consumer perspective (B2C) and 2017 from a decision-maker perspective (B2B). This year, 50 000 consumers in more than 20 industries have been analysed on sustainability. In total, 1148 brands have been evaluated. Currently, the study is conducted annually in Sweden, Norway, Denmark, Finland and the Netherlands.

The official report is freely available and provide the key insights, consumer developments, brands ranking and methodology of Sustainable Brand Index™ B2C 2019.

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ABOUT SUSTAINABLE BRAND INDEX™?

01. WHAT IS SUSTAINABLE BRAND INDEX™?

EUROPE'S LARGEST BRAND STUDY FOCUSING ON SUSTAINABILITY

Sustainable Brand Index™ is Europe's largest brand study focusing on sustainability. Based on 50 000 consumer interviews, the study looks at how sustainable your brand is perceived to be, why it is perceived this way and what to do about it. The study also includes a comprehensive trend analysis, consumer behaviour analysis and strategic recommendations.

Sustainable Brand Index™ consists of the following parts:

- Trends & Future Analysis

Review of what happened in the rest of the world and on the market over the last year, and, above all, the merging trends wee see in each country.

- The Sustainable Consumer

A mapping of who the sustainable consumer is, what drives and hinders sustainable behaviours, and emerging consumption patterns.

- Brand Analysis Focusing on Sustainability

Evaluation and analysis of how sustainable each brand is perceived, why it is perceived so and how it should be handled in the best possible way.

03. WHAT IS THE PURPOSE OF SUSTAINABLE BRAND INDEX™?

THE TOOL FOR SUSTAINABLE BRANDING

The purpose of Sustainable Brand Index™ is to visualise the value of sustainable branding and spread and increase knowledge about this topic. By motivating, inspiring and providing a concrete tool, we encourage companies to improve their work and dare to communicate. We believe that the more companies talk about sustainability and what they do, the higher the interest among consumers. Increased interest, in turn, leads to increased knowledge, which in the long run also leads to higher demands on brands.

02. HOW DO YOU COLLECT THE DATA IN SUSTAINABLE BRAND INDEX™?

THREE-PART STUDY BASED ON 50 000 CONSUMER INTERVIEWS

Sustainable Brand Index™ is an independent three-part study, based on desk research and two quantitative web-surveys. Each brand is assessed by at least 1 000 respondents.

The Data Collection 2019

- The different steps in the study were conducted during November 2018 to January 2019 and February to March 2019 respectively.
- Every brand is evaluated by at least 1000 people. In total, more than 1100 brands were evaluated by 50 000 respondents.
- The target audience in each of the surveys is the general public, 16-70 years old, in each country.
- The basis for the ranking in Sustainable Brand Index™ is the UN Global Goals for Sustainable Development. However, the ranking is only the tip of the iceberg in the study. We also look at a so-called external definition of sustainability that focuses on consumer perceptions of what sustainability is - their expectations and demands on companies.
- The selection of brands is based on the activity on the market of each respective country, turnover & market share, and general brand awareness.

SB INSIGHT

SUSTAINABLE BRAND INDEX™ IS CARRIED OUT BY THE INSIGHT AGENCY SB INSIGHT

IS YOUR BRAND LISTED IN THE STUDY? LUCKY YOU!

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TESTIMONIAL

Sustainable Brand Index is an important tool for us. The study highlights sustainability in a way that is relevant and creates interest among stakeholders in society. Our tailored brand report has been crucial for our development in recent years – both internally and in the official ranking. The rigorous insights in the report are valuable and give us a solid foundation to work with both our brand and our communications.

- Anders Rynell, Marketing Director, Apoteket Sweden AB

A TAILORED STRATEGY REPORT FOR YOUR BRAND

We have a lot of actionable insights tailored for your brand, answering how your brand is perceived within sustainability and why it is perceived that way, followed by recommendations for strategic business development building on these insights.

Contact us to learn more about the strategy report for your brand. The report is based on the results of the Sustainable Brand Index™ and tailored according to your conditions and needs, with a long-term perspective in mind.

WHAT´S IN IT FOR YOU?

- Learn about how to build a sustainable brand and how to change and improve perception.
- Get increased market share by profound insights in efficient communication strategies based on the consumers demands and needs within sustainability.
- Find a way to differentiate your brand within sustainability by getting insight into your competitors and their strengths and weaknesses.
- Be able to plan for a long-term sustainable brand by understanding the future risks and opportunities that might affect you and how to respond to them.

A VITAL TOOL – WITH MANY APPLICATIONS

We provide brands like IKEA and ING with tailored insights every year, and our clients use the report in different ways, but most of all it is used as a tool for:

- Strategic decision-making - for example in the materiality analysis.
- Communication – deciding whom to communicate to and with what message.
- Monitoring – follow up the actual effects on efforts and/or allocate resources more efficiently.

Curious about how you can strengthen your brand with insights from Sustainable Brand Index?

01

KEY INSIGHTS

2019

A REFLECTION ON THE DUTCH MARKET

The majority of the Dutch population is discussing sustainability on a regular basis and compared to the other Nordic countries, it is still the country where sustainability impacts actual buying decisions the most. Overall, we can see that Dutch consumers are rather mature when it comes to sustainability and the percentage of consumers that cares deeply about environmental and social responsibility is growing.

People furthermore believe that individuals are responsible for changing their consumption patterns in order to fight climate change. However, the gap between talking about sustainability issues and actually changing ones individual behaviour is still large. As awareness levels are growing, consumers are also becoming more critical and sceptical towards what it means to 'make the more sustainable choice'. A part of consumers are experiencing increasing 'climate anxiety', while others are not ready yet to point a finger towards themselves.

Whereas the national climate debate has been unifying for some countries e.g. Sweden, it is still a rather polarising issue in The Netherlands. The National Climate Agreement of 2018, in which the Dutch government has presented its plans to keep national and international targets to fight climate change, has been a big political debate. Short-term financial arguments and political polarisation are negatively effecting trust and progress within the political arena. Over the last year, we can see that political preferences and the perception on climate change is furthermore increasingly influenced by age, gender and demographics.

Within the private sector, we do see that sustainability is growing and taking a more integrated role. Sustainable Brand Index 2019 shows a positive trend in sustainability scores among the brands included in the ranking. Dutch companies and cities are still leading the way when it comes to researching and integrating sustainability across industries.

Building a sustainable brand is more critical today than ever before. People are more aware and vocal about sustainability, which means demand are rising. It is important for brands to take a clear stand on what sustainability means for them and consumers can be empowered to join their mission.

Even though external events such as wildfires, flooding and the IPCC Report on Climate Change give consumers a sense of urgency and an intellectual understanding of the severity of things, there is still a great need for effective marketing and sales to change behaviours. It is like going to the gym. You know you have to, but it is still something that most people put off. Industry-wide solutions are likely to be an essential way forward for creating behavioural changes. For people to act, the norm needs to change quickly. This will happen if all, or at least a majority, of the actors in an industry, act together.

Eva Seignette

Marketing Manager

Annemarije Tillema

Country Manager The Netherlands

SUSTAINABILITY CREATES CONVERSATIONS

In all Nordic countries, we see that the share of consumers that claim to discuss sustainability to some extent (with friends and family) increase quite significantly since last year. The trend in all countries is almost identical. The steepest increase is to be found in Norway, followed by Denmark and Finland. Sweden has a slightly lighter increase, but it is still significant.

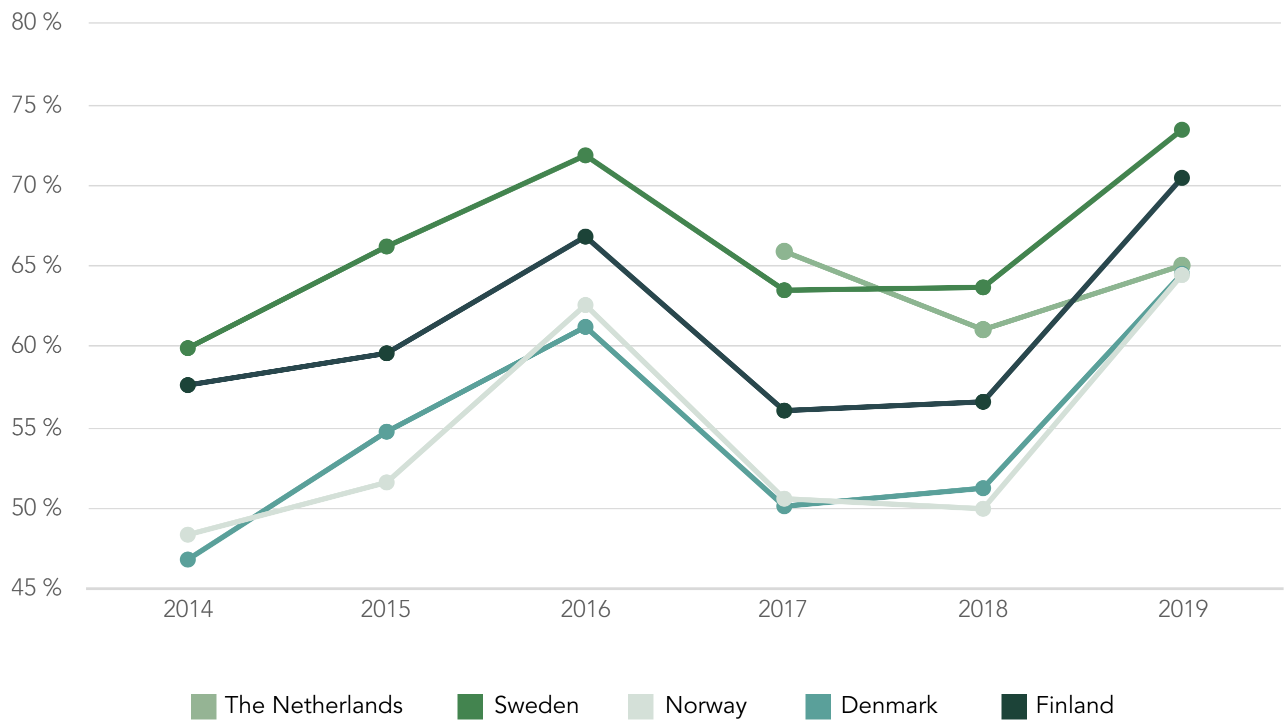
If glancing at the Netherlands we can also see an increase of those discussing sustainability since 2018. However, this increase is significantly more flat than the development in the Nordic countries.

The reason for the increase in all countries is that consumers are now more focused on sustainability issues, with the climate in the lead, than ever. The last two years have been more characterised by other issues like Donald Trump, Brexit and immigration problems. This year, people seem to return to more sustainability-oriented issues. An increased focus on climate change is also something that unites people, rather than polarises. It is less sensitive than, for example, immigration which makes it easier to gather around.

In Norway, we can see that a greater focus on climate change from both companies and the government has helped to push consumer interest. In Finland, one of the main reasons for the steep increase in people discussing sustainability is the IPCC-report, published last year. It made a big impression on companies and government as well as consumers.

One thing that affected the difference between the Netherlands and the Nordics was partly the summer heat wave in 2018. Despite hitting both the Netherlands and the Nordics, the heat wave was more out of character for the Nordic countries, making it extremely debated. For example, while the Netherlands had the country’s longest heatwave since 2006, Sweden experienced its warmest May and July ever recorded, Denmark had its warmest May ever and the driest June since 1920. This made the Nordic discussions about climate change to increase heavily.

THE % OF CONSUMERS WHO DISCUSS SUSTAINABILITY



MORE CONSUMERS THAN EVER CLAIM TO BE AFFECTED

As we could see on the previous pages about people discussing sustainability, the awareness has hit an all-time high in all Nordic countries, while its almost as high as in 2017 in the Netherlands.

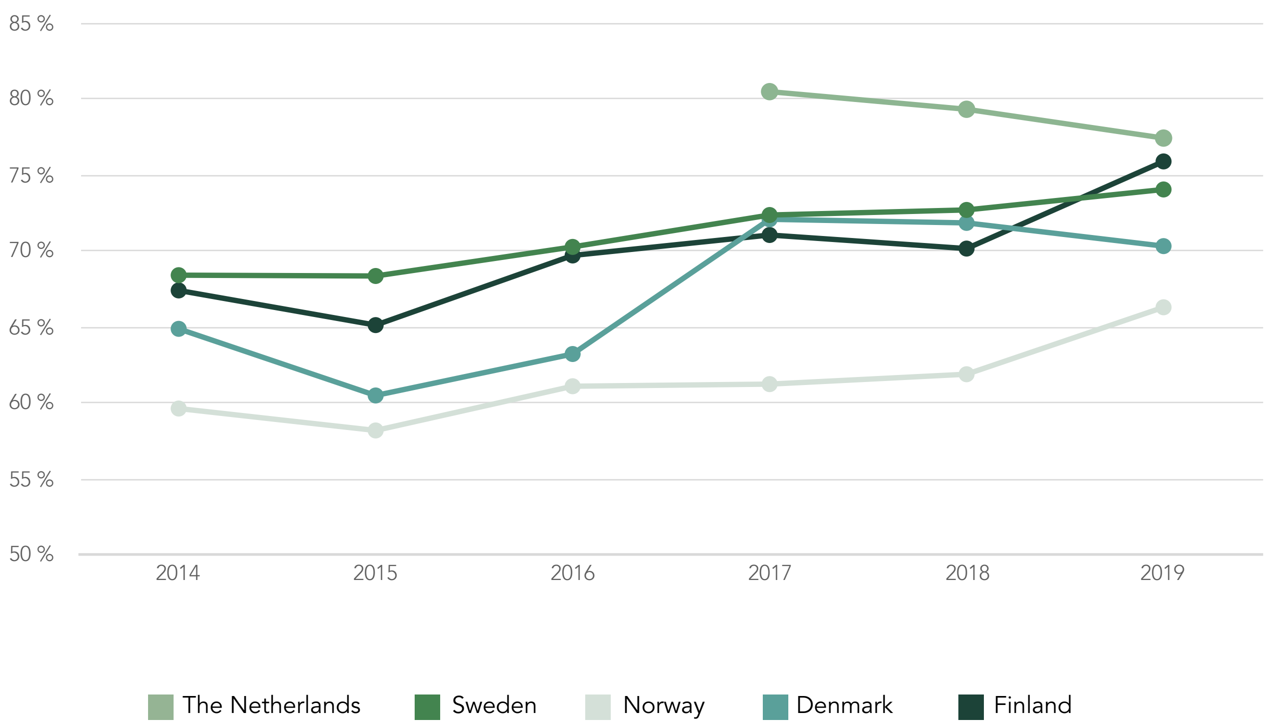
When looking at people claiming to act sustainably in their purchasing decisions, the trend is positive in all countries but Denmark and the Netherlands. However, the increase is not as drastic as the one we saw within the discussions about sustainability.

Despite the slightly negative development in the Netherlands, it is still the country where most consumers claim to consider sustainability in their purchasing decisions. Also, for the first time, Finland bypasses Sweden on this parameter. Norway sees a considerable increase, whereas Denmark has a slightly negative development.

The big difference this year, in all countries but Denmark and the Netherlands, is that the ones that use to claim to be unaffected by sustainability now actually confess to being affected. In short, the bar has been raised.

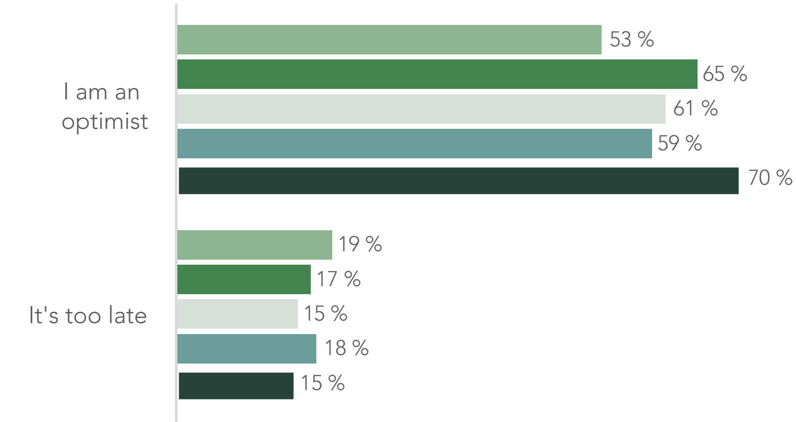
In Denmark, the problem is that a much higher share claims to discuss sustainability, as seen on the previous pages, but that does not transfer to purchasing decisions. Hence, it is a bit harder for Danish companies to convert engagement and interest in sustainability to real actions. In the Netherlands, the issue is rather a flat development when it comes to discussing sustainability which makes the development of actually considering sustainability in your buying decisions to not develop much either – and even to decrease slightly. Therefor, with increasing discussions about sustainability in the future, we expect the Dutch consumers' buying decisions to become even more affected by sustainability, in a positive manner.

THE % OF CONSUMERS WHO SAY THAT
SUSTAINABILITY IMPACTS THEIR BUYING DECISION



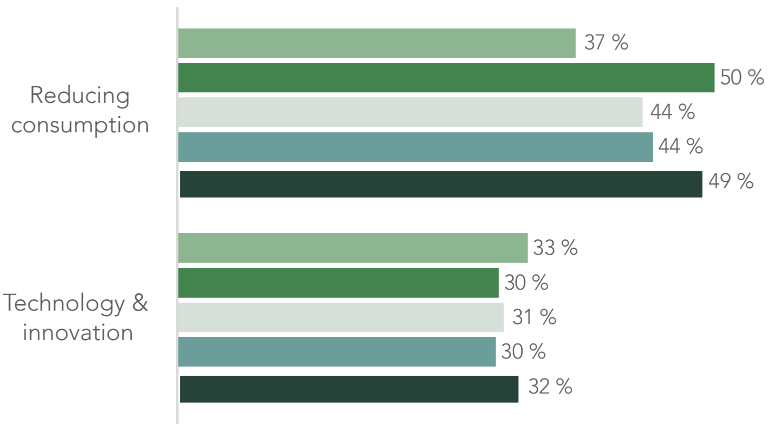
CLIMATE ISSUES & THE FUTURE

The Netherlands   Sweden   Norway   Denmark   Finland



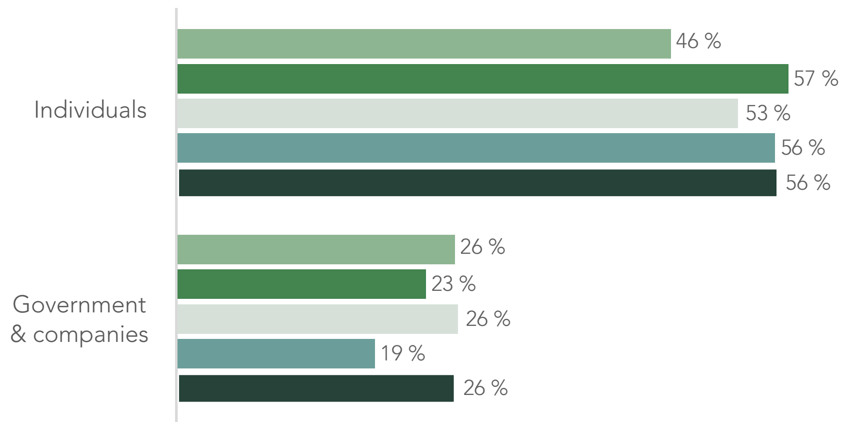
ATTITUDE

Most of the consumers are optimists and believe that we can solve the climate crisis, especially in Finland. However, this share is smaller in the Netherlands compared to the Nordic countries. On the other hand, between 15-19% of the consumers in each respective country believe that it is too late to do anything about the climate crisis. But the optimistic approach is clearly surpassing the pessimistic one.



SOLUTION

About half of the Nordic consumers in each respective country are convinced that reduced consumption is more important than new technology and innovation in order to solve the climate crisis, while about 30% are stronger believers in the fact that new technology will actually solve it. In the Netherlands, however, the share of those emphasizing reduced consumption is a bit smaller than in the Nordic countries, while the share of those emphasizing technological advancements is slightly larger.



RESPONSIBILITY

46% of the Dutch consumers are convinced that individuals need to make own sacrifices in order to solve the climate crisis while 26% believes that citizens are not responsible but that it is up to politicians and companies to solve climate change. If looking at the Nordics, the share that put responsibility on individuals is significantly larger than in the Netherlands.

N.B. The shares of these charts do not add up to 100%. The proportion of consumers not represented here has stated that they are indifferent to each respective statement. In order to facilitate the visualization of this data, we have therefore excluded these proportions of consumers in the charts on this page.

02

CONSUMER

2019

OUR FOUR BEHAVIOUR GROUPS

EGO

DOES NOT CARE ABOUT SUSTAINABILITY

- Middle-aged man on the countryside or in the city
- Traditional values
- Interested in sports and local news
- Not interested in sustainability

PRIORITY

SIMPLICITY & PRICE

THE NETHERLANDS	SWEDEN	NORWAY	DENMARK	FINLAND
18%	20%	28%	26%	21%

Ego is usually a man with strong views about how society functions, or at least how it should function. He has traditional values. His greatest interests are his own existence, things happening in his own country, the local community, and of course the local sports team. Ego is either a middle-aged worker/blue-collar on the countryside or a middle-aged official/white-collar in the big city. Ego in the city has more money than people in general. He is therefore less worried and interested in other people and their feelings. Ego´s educational level is slightly lower than the national average.

Ego is completely uninterested in sustainability. The commitment to be sustainable or listen to companies that talk about sustainability is low, often non-existent. Ego bases behaviour and purchasing decisions on function, simplicity and speed. It is primarily about satisfying a need, regardless of the consequence.

MODERATE

BELIEVES THAT SUSTAINABILITY CAN BE A BIT INTERESTING

Moderate is today the majority of the population. It is a man or a woman, on the countryside or in the city. Moderate is the symbol of the "ordinary citizen". Moderate does not make too much noise. Instead, Moderate is pretty pleased with things as they are. A Moderate consumer follows the developments in the local community through the news. Sometimes, Moderate worries about where the world is heading. But Moderate is generally satisfied with life. As a consumer, Moderate has general requirements in terms of longevity, quality and function. In addition, Moderate is interested in the price tag.

Moderate is a bit interested in sustainability but does not drive the societal agenda forward. Instead, Moderate is a follower when it comes to sustainability. Moderate follows what other people do, and then mainly the Smart group. Moderate behaves sustainably when it is trendy. Even more so if it gives them positive social attention.

- The average consumer
- Satisfied with life – does not make any fuss
- Thinks that sustainability is more and more interesting

PRIORITY

QUALITY, FUNCTION & LONGEVITY

THE NETHERLANDS	SWEDEN	NORWAY	DENMARK	FINLAND
47%	45%	41%	43%	44%

SMART

CURIOUS & INTERESTED IN SUSTAINABILITY

- Determined with high standards
- Likes to discuss sustainability and learn more
- Thinks that sustainability is very interesting

PRIORITY

"WHAT'S IN IT FOR ME?"
QUALITY, SERVICE & HEALTH

THE NETHERLANDS	SWEDEN	NORWAY	DENMARK	FINLAND
27%	25%	23%	22%	28%

Smart is often a determined person who focuses on his or her own wellbeing and health. It is a person with high standards and thus also high demands on the companies whose products and services it consumes. "What's in it for me?" is always the first question for Smart. Quality and service are important priorities. The Smart consumers see the possibility to combine things that are good for themselves with what is good for the world. They make everyday choices that balance these things. The Smart consumer wants to make a difference in everyday life through their decisions. They search for brands that they can identify with, and is interested in what happens in society. Smart actively seeks information about what is going on in the world.

Smart is curious and interested in sustainability. Doing the right things and choosing sustainable brands is a matter of lifestyle. It is a matter of identity for Smart. However, an important driver for sustainability is always "What's in it for me". Smart does not compromise other important values to fulfill sustainability values only. In some cases, they behave sustainable without knowing it. For example, when his or her choices are driven by a focus on health or safety.

DEDICATED

ZEALOUS & WELL-INFORMED ON SUSTAINABILITY

Dedicated is an active man or woman, young or old, that prioritises sustainability in all parts of life. It is a person who lives consciously and weighs every consumption decision carefully. Dedicated is left-oriented and interested in international relations, politics and culture. In relation to companies Dedicated is questioning and zealous. Dedicated prefers to listen to other Dedicated consumers. Usually she or he also reads a lot and avoids accepting information directly from companies. Dedicated assumes that companies are bad until the contrary has been proved. The knowledge of sustainability is high. Dedicated is often well-informed about what companies do in the area of sustainability. However, Dedicated´s understanding of companies and their ambitions is very limited. Dedicated often contacts companies to put them against the wall. Finally, Dedicated is also active in social media channels.

- Knowledgeable and well-informed on sustainability
- Actively seeks information on sustainability
- Zealous and critical towards corporations
- Focused on sustainability, whatever the situation

PRIORITY

SUSTAINABILITY

THE NETHERLANDS	SWEDEN	NORWAY	DENMARK	FINLAND
8%	9%	8%	9%	7%

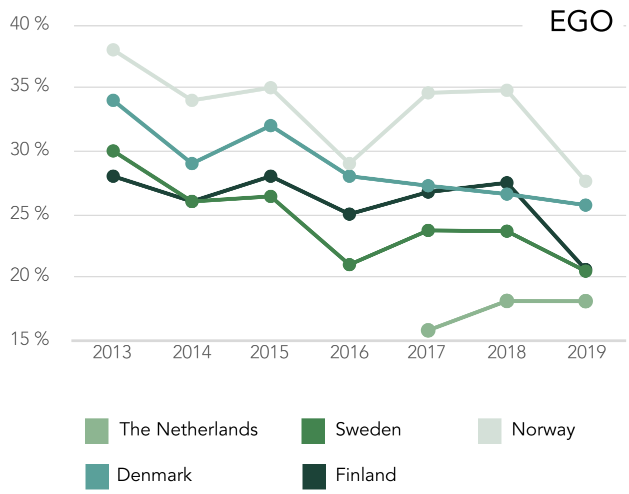
BEHAVIOUR GROUPS - DEVELOPMENT 2013-2019

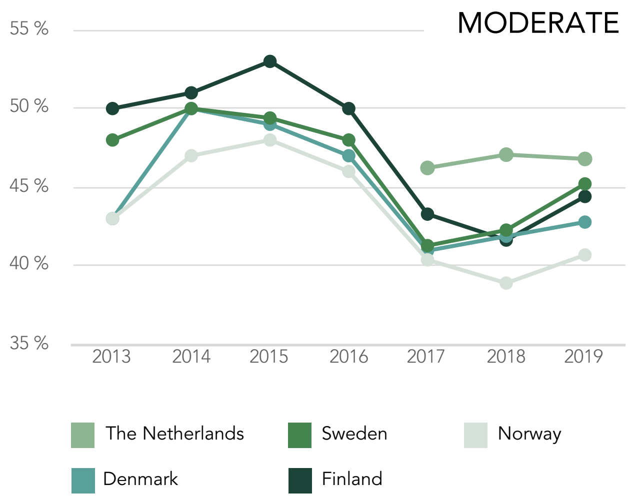
The development of our Consumer Groups varies quite a lot between the different countries. In the Netherlands, the development is rather flat since 2018. Both the share of Ego, Moderate, Smart and Dedicated consumers looks rather similar to last year's results. If comparing with the Nordic countries we can see that the Netherlands keeps having the smallest share of Ego consumers and the largest share of Moderates, while the Smart group is now the second largest one, after Finland. In the Dedicated segment the differences between the countries are small overall.

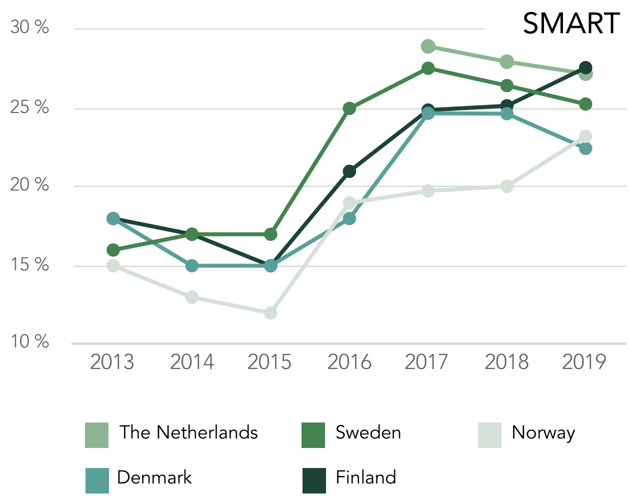
In Norway, we note an all-time high for the Smart group, increasing to 23 per cent of the population. The Ego group also decreases from 35 per cent to 28 per cent. It is indeed something in the water in Norway.

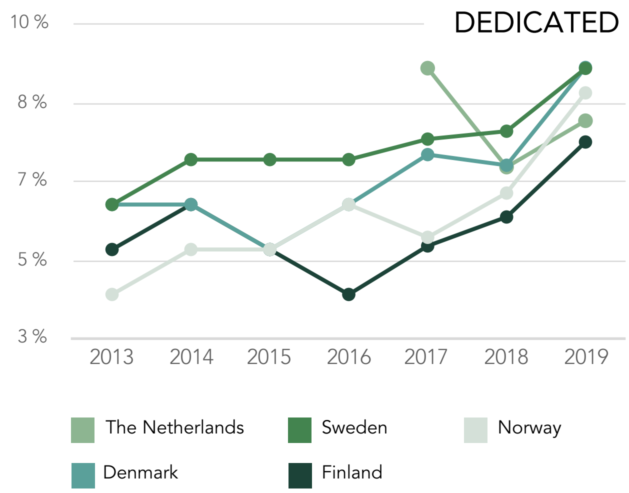
Finland exhibits a similar development. Smart increases from 25 per cent to an excellent 28 per cent. But the most exciting thing is perhaps that the Ego group decreases in size, from 27 per cent to 21 per cent.

In Sweden, we see that Ego decreases for the benefit of Moderate. The Ego group is therefore on an all-time low this year, and we do see that the polarisation of society that we spotted a few years back may have taken a pause.









03

RANKING

2019

A NOTE ON THE DUTCH RANKING

The overall development of the ranking in the Netherlands is slightly positive, meaning that scores are a bit higher than last year.

The positive development is based on increases in both environmental and social scores for the brands, but especially in the social scores. The contributors to this development are both increases in overall consumer awareness of brand sustainability efforts, as well as an increase in the evaluation of brands' sustainability efforts amongst those consumers with actual awareness.

The overall positive development of the Dutch market is characteristic for almost all industries. However, the industry that increases its score the most is the Mobility Industry.

RANKING - NETHERLANDS

TOP 10

01. Tony's Chocolonely

02. Greenchoice

03. Zonnatura

04. Tesla

05. ANWB

06. NS

07. IKEA

08. Philips

09. Eneco

10. Campina

BRAND THAT **INCREASED** ITS SCORE MOST SINCE 2018

ING

18%

BANKS

BRAND THAT **DECREASED** ITS SCORE MOST SINCE 2018

Tesla

13%

AUTOMOTIVE

RANKING - NETHERLANDS

INDUSTRY LEADERS

1	TONY'S CHOCOLONELY	FOOD & BEVERAGE
2	GREENCHOICE	ENERGY
4	TESLA	AUTOMOTIVE
5	ANWB	MOBILITY
7	IKEA	RETAIL
11	ALBERT HEIJN	SUPERMARKETS
14	ASN BANK	BANKS
18	LANDAL GREENPARKS	TRAVEL & LEISURE
35	MENZIS	INSURANCE
38	LA PLACE	RESTAURANTS
64	VAN DER VALK	HOTEL

INDUSTRY RANKING

1. BANKS
2. ENERGY
3. SUPERMARKETS
4. MOBILITY
5. FOOD & BEVERAGE
6. INSURANCE
7. AUTOMOTIVE
8. RETAIL
9. RESTAURANTS
10. HOTEL
11. TRAVEL & LEISURE

SUSTAINABLE BRAND INDEX B2C

RANKING - NETHERLANDS

1. **Tony's Chocolonely**
2. Greenchoice
3. Zonnatura
4. Tesla
5. ANWB
6. NS
7. IKEA
8. Philips
9. Eneco
10. Campina
11. Albert Heijn
12. Alpro
13. The Body Shop
14. ASN Bank
15. Arla
16. Becel
17. Becel Pro Activ
18. Landal GreenParks
19. Lidl
20. Triodos Bank
21. Vandebron
22. Rabobank
23. Melkunie
24. Arriva
25. Jumbo Supermarkten
26. HEMA
27. Douwe Egberts
28. Essent
29. Optimel
30. Pickwick
31. Rituals
32. Energiedirect.nl
33. Campina Botergoud
34. Connexxion
35. Menzis
36. Bol.com
37. Oatly
38. La Place
39. ING
40. Almhof
41. PLUS
42. Beemster kaas
43. NLE (Nederlandse Energie Maatschappij)
44. Toyota
45. Schiphol
46. Nuon Vattenfall
47. Maaslander
48. Activia
49. Coolblue
50. ENGIE
51. SNS Bank
52. ABN AMRO
53. Bolletje
54. Qurrent
55. McDonald's
56. Blue Band
57. Volvo
58. Center Parks
59. Appelsientje
60. Milner
61. Etos
62. VGZ
63. C&A
64. Van der Valk
65. CoolBest
66. Kruidvat
67. Nike
68. Coop
69. Calvé
70. KLM
71. E.ON
72. Roompot Vakanties
73. Cote d'Or
74. Volksbank
75. Nespresso
76. Karwei
77. Bona
78. Shell
79. Honig
80. Bertolli
81. Knorr
82. Oxxio
83. Starbucks
84. CZ
85. Kia
86. Heineken
87. Volkswagen
88. Zeeman
89. Kinder
90. Nestlé Chocolade
91. Verkade
92. NESCAFÉ
93. Peugeot
94. Knab
95. Coca-Cola
96. Alliander
97. Chocomel
98. Praxis
99. H&M
100. Danio
101. Mercedes-Benz
102. Dirk van den Broek
103. NH Hotel Group
104. Old Amsterdam
105. Ford
106. Grolsch
107. Achmea
108. Mercure
109. Gamma
110. Aldi
111. Mars
112. Opel
113. De Ruijter
114. Fletcher Hotels
115. Milka
116. BMW
117. Heinz
118. Leen Bakker
119. Kanis & Gunnink
120. De Bijenkorf
121. Croma
122. KitKat
123. Transavia
124. Blokker
125. Action
126. SPAR
127. Esso
128. Grand'Italia
129. Maggi
130. Kras
131. Kwantum
132. Xenos
133. Goossens
134. NESCAFÉ Dolce Gusto
135. Pepsi-Cola
136. Bavaria
137. Amstel
138. JYSK
139. TUI
140. Renault
141. Subway
142. Wehkamp
143. WE Fashion
144. TUIfly
145. Toblerone
146. Burger King
147. Beter Bed
148. KFC
149. Primark
150. Sunweb
151. M&M's
152. BP
153. Skoda
154. Total
155. Novotel
156. Oad
157. Thomas Cook
158. L'Oréal
159. ibis
160. D-reizen
161. Neckermann Reizen
162. Zara
163. Corendon
164. easyJet
165. FEBO
166. Trendhopper
167. Ryanair

= Industry leader

ABOUT THE RANKING IN SUSTAINABLE BRAND INDEX™

The ranking is based on the percentage of consumers who assess the company's sustainability efforts as good (4) or very good (5) on a scale of 1-5 + "don´t know." The maximum score is 200%. A company that has 200%, performs very well within both environmental and social responsibility according to consumers, ie. 100% have then answered 4 or 5 (a company like that does not exist).

RANKING DEVELOPMENT 2017 - 2019

	2019	2018	2017
Tony's Chocolonely	1	1	
Greenchoice	2	3	1
Zonnatura	3	4	3
Tesla	4	2	
ANWB	5	6	
NS	6	10	
IKEA	7	5	2
Philips	8	8	4
Eneco	9	16	8
Campina	10	11	7
Albert Heijn	11	9	9
Alpro	12		
The Body Shop	13	13	12
ASN Bank	14	12	11
Arla	15	21	20
Becel	16		
Becel Pro Activ	17		
Landal GreenParks	18	25	
Lidl	19	20	22
Triodos Bank	20	14	6
Vandebron	21	7	27
Rabobank	22	17	13
Melkunie	23		
Arriva	24	56	
Jumbo Supermarkten	25	23	23
HEMA	26	19	10
Douwe Egberts	27	27	19
Essent	28	30	17
Optimel	29	39	42
Pickwick	30	15	14
Rituals	31	18	15
Energiedirect.nl	32	28	21
Campina Botergoud	33		
Connexxion	34	47	
Menzis	35		

* Some brands have been removed from the study over time, due to a variety of reasons, e.g. bankruptcy, mergers etc. This means some numbers might be missing from the ranking of previous years.

RANKING DEVELOPMENT 2017 - 2019

	2019	2018	2017
Bol.com	36	31	44
Oatly	37		
La Place	38	32	25
ING	39	86	30
Almhof	40	26	33
PLUS	41	34	29
Beemster kaas	42		
NLE (Nederlandse Energie Maatschappij)	43	40	35
Toyota	44	44	
Schiphol	45	37	
Nuon Vattenfall	46	22	16
Maaslander	47	33	18
Activia	48	46	32
Coolblue	49	38	74
ENGIE	50	42	55
SNS Bank	51	57	59
ABN AMRO	52	59	50
Bolletje	53	53	37
Qurrent	54	24	46
McDonald's	55	45	34
Blue Band	56		
Volvo	57	35	
Center Parks	58	41	
Appelsientje	59	48	40
Milner	60	62	28
Etos	61	73	75
VGZ	62		
C&A	63	63	53
Van der Valk	64	64	
CoolBest	65	29	45
Kruidvat	66	69	65
Nike	67	100	51
Coop	68	68	79
Calvé	69	67	57
KLM	70	49	

* Some brands have been removed from the study over time, due to a variety of reasons, e.g. bankruptcy, mergers etc. This means some numbers might be missing from the ranking of previous years.

RANKING DEVELOPMENT 2017 - 2019

	2019	2018	2017
E.ON	71	52	26
Roompot Vakanties	72	85	
Cote d'Or	73	70	
Volksbank	74	71	
Nespresso	75	36	73
Karwei	76	87	48
Bona	77		
Shell	78	96	56
Honig	79	55	62
Bertolli	80	81	
Knorr	81	84	64
Oxxio	82	77	43
Starbucks	83	61	
CZ	84		
Kia	85	80	
Heineken	86	43	38
Volkswagen	87	113	
Zeeman	88	66	82
Kinder	89	78	
Nestlé Chocolade	90	54	
Verkade	91	60	31
NESCAFÉ	92	50	70
Peugeot	93	141	
Knab	94	91	
Coca-Cola	95	51	36
Alliander	96	101	78
Chocomel	97	75	60
Praxis	98	65	49
H&M	99	93	52
Danio	100	83	61
Mercedes-Benz	101	88	
Dirk van den Broek	102	89	77
NH Hotel Group	103	107	
Old Amsterdam	104	97	85
Ford	105	105	

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RANKING DEVELOPMENT 2017 - 2019

	2019	2018	2017
Grolsch	106	108	47
Achmea	107		
Mercure	108	98	
Gamma	109	72	76
Aldi	110	110	86
Mars	111	118	91
Opel	112	94	
De Ruijter	113	58	71
Fletcher Hotels	114	90	
Milka	115	95	
BMW	116	109	
Heinz	117	74	68
Leen Bakker	118	133	81
Kanis & Gunnink	119	76	39
De Bijenkorf	120	103	66
Croma	121		
KitKat	122	144	
Transavia	123	111	
Blokker	124	102	69
Action	125	136	92
SPAR	126	121	96
Esso	127	92	63
Grand'Italia	128	112	88
Maggi	129	119	100
Kras	130	131	
Kwantum	131	126	
Xenos	132	117	84
Goossens	133	137	105
NESCAFÉ Dolce Gusto	134	82	54
Pepsi-Cola	135	120	94

* Some brands have been removed from the study over time, due to a variety of reasons, e.g. bankruptcy, mergers etc. This means some numbers might be missing from the ranking of previous years.

RANKING DEVELOPMENT 2017 - 2019

	2019	2018	2017
Bavaria	136	116	67
Amstel	137	79	80
JYSK	138	145	87
TUI	139	104	
Renault	140	99	
Subway	141	106	90
Wehkamp	142	127	
WE Fashion	143	123	97
TUIfly	144	115	
Toblerone	145	129	
Burger King	146	152	98
Beter Bed	147	138	
KFC	148	151	99
Primark	149	134	103
Sunweb	150	135	
M&M's	151	139	
BP	152	122	83
Skoda	153	125	
Total	154	128	95
Novotel	155	124	
Oad	156	146	
Thomas Cook	157	147	
L'Oréal	158	142	93
ibis	159	114	
D-reizen	160	143	
Neckermann Reizen	161	130	
Zara	162	132	102
Corendon	163	140	
easyJet	164	153	
FEBO	165	150	104
Trendhopper	166	149	
Ryanair	167	148	

* Some brands have been removed from the study over time, due to a variety of reasons, e.g. bankruptcy, mergers etc. This means some numbers might be missing from the ranking of previous years.

04

METHODOLOGY

SUSTAINABLE BRAND INDEX™ 2019 – DATA COLLECTION

ABOUT THE STUDY

WHAT IS SUSTAINABLE BRAND INDEX™?

Sustainable Brand Index™ is Europe´s largest independent brand study focused on sustainability. Based on 50 000 consumer interviews in the Nordic and the Netherlands, the study looks at how sustainable your brand is perceived to be, why it is perceived this way and what to do about it. The study also includes a comprehensive trend analysis, consumer behaviour analysis and strategic recommendations.

HOW DO YOU COLLECT THE DATA IN SUSTAINABLE BRAND INDEX™?

Sustainable Brand Index™ is a Sustainable Brand Index™ is an independent three-part study, based on desk research and two quantitative web-surveys. Each brand is assessed by at least 1 000 respondents.

- The average length of the surveys is approximately 10 minutes
- In accordance with our policy, we do not use panels that are self-recruited
- In the surveys, we set quotas for gender, age and geography
- In a final step, the data is weighted for further fine-tuning

HOW MANY RESPONDENTS HAVE BEEN INTERVIEWED IN SUSTAINABLE BRAND INDEX™ 2019?

In total, 50,000 respondents have been interviewed, and each brand has been randomly assessed by at least 1 000 people. These respondents are spread across all countries in the study (Sweden, Norway, Denmark, Finland & The Netherlands.

Each respondent receives a completely random selection of brands to avoid systematic errors in the study.

THE NUMBER OF RESPONDENTS IN SUSTAINABLE BRAND INDEX™ 2019

SWEDEN	18 600
NORWAY	7 700
DENMARK	7 400
FINLAND	10 300
THE NETHERLANDS	6 000
TOTAL	50 000

HOW IS THE TARGET AUDIENCE IN SUSTAINABLE BRAND INDEX™ 2019 DEFINED?

The target audience in each of the surveys is the general public, 16-70 years old, in each country.

HOW DO YOU CHOOSE THE RESPONDENTS?

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. Respondents are recruited through requests made on websites on the internet (either on news sites or in connection with an online purchase). We do not work with self-recruited panels, i.e. panels made up of people who themselves have signed up to answer questions.

The respondents who then answer the questions in Sustainable Brand Index™ are selected from the mentioned panels. To get a so-called nationally representative selection, we use so-called quotas. This means that, even before we ask questions, we decide that there must be a certain distribution of respondents, based on gender, age and geography (to reflect the population of each country).

WHEN WERE THE INTERVIEWS IN SUSTAINABLE BRAND INDEX™ 2019 CONDUCTED?

The different steps in the study were conducted during November 2018 to January 2019 and February to March 2019 respectively.

HOW ARE THE BRANDS IN SUSTAINABLE BRAND INDEX™ SELECTED?

The selection of brands in the study is independent of SB Insight and is based mainly on three parameters:

- Activity on the Market of the Country
- Turnover & Market Share
- General Brand Awareness

The purpose of these criteria is to create a selection that mirrors the brands that consumers meet in their everyday life. The selection is primarily focused on corporate brands but are also complemented with product brands based on market share and general brand awareness that are relevant in order to create a justified image of each industry respectively.

HOW IS SUSTAINABILITY DEFINED IN SUSTAINABLE BRAND INDEX™?

The basis for the ranking in Sustainable Brand Index ™ is the UN Global Goals for Sustainable Development. However, the ranking is only the tip of the iceberg in the study. We also look at a so-called external definition of sustainability that focuses on consumer perceptions of what sustainability is: their expectations and demands on companies. Furthermore, the study also digs deep within specific focus areas relevant to each industry. In 2017, we also began to examine the attitudes towards the 17 Sustainable Development Goals.

HOW MANY BRANDS ARE CHOSEN IN SUSTAINABLE BRAND INDEX™?

We try to add new brands every year as we expand the study. This is the current number of brands in each country, chosen based on the parameters above.

SWEDEN	355 BRANDS
NORWAY	233 BRANDS
DENMARK	219 BRANDS
FINLAND	174 BRANDS
THE NETHERLANDS	167 BRANDS
TOTAL	1148 BRANDS

HOW HAS THE SIZE OF SUSTAINABLE BRAND INDEX™ EVOLVED OVER THE YEARS?

	2011	2012	2013	2014	2015	2016	2017	2018	2019
COUNTRIES	SWEDEN	SWEDEN	SWEDEN, NORWAY, DENMARK, FINLAND	SWEDEN, NORWAY, DENMARK, FINLAND	SWEDEN, NORWAY, DENMARK, FINLAND	SWEDEN, NORWAY, DENMARK, FINLAND	SWEDEN, NORWAY, DENMARK, FINLAND, THE NETHERLANDS	SWEDEN, NORWAY, DENMARK, FINLAND, THE NETHERLANDS	SWEDEN, NORWAY, DENMARK, FINLAND, THE NETHERLANDS
NUMBER OF RESPONDENTS	3 000	8 000	18 000	25 000	27 000	30 000	36 000	44 400	50 000
NUMBER OF BRANDS	151	200	450	636	709	750	940	1064	1148

ABOUT SB INSIGHT

SB Insight is the founder of Sustainable Brand Index™.
We are an insight agency on a mission to create sustainable brands.
We provide knowledge and understanding of how sustainability affects branding, communication and business development.

Our insights come in different forms and are used for strategic decision-making. Everything is based in our expertise within branding & communications, sustainability, behavioural science and market research.

OUR BUSINESS AREAS

SB Academy
we share

SB Leaders
we connect

SB Reports
we analyse

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