

SUSTAINABLE FUTURES CONFERENCE

Business transformation for
the era of climate disruption

THE CUSTOMER'S ALWAYS RIGHT: Consumer sentiment as a barometer to forecast change

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Risilience Sustainable Futures Conference 12th October 2023



Consumer's climate awareness is growing



36%
feel "greatly"
personally affected



2x
Faster growth for
sustainable products

85%
shifted to being
more sustainable



\$1 in \$5
is from an
environmentally
conscious consumer

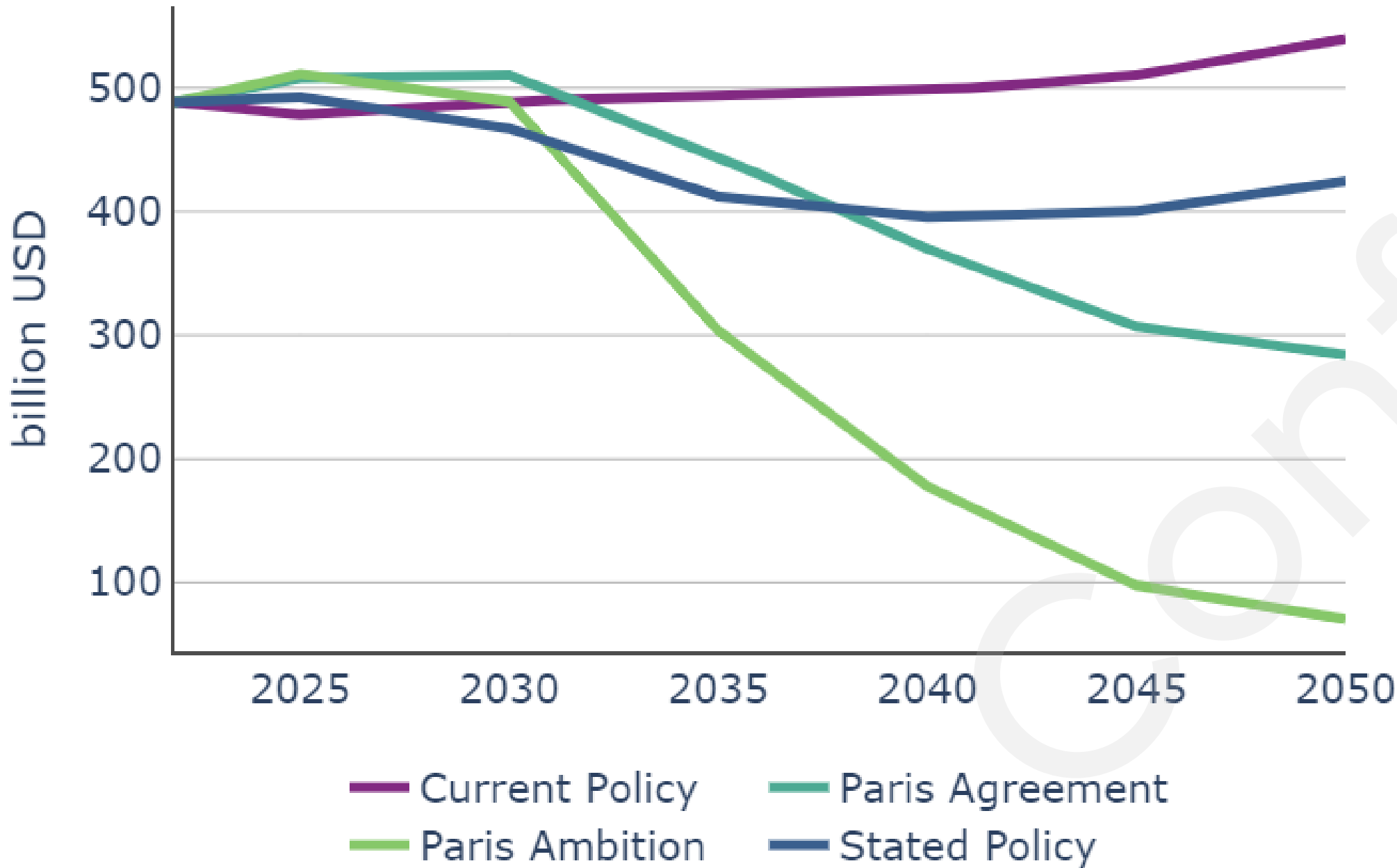


Demand changes

Macro

Entire sector demand change

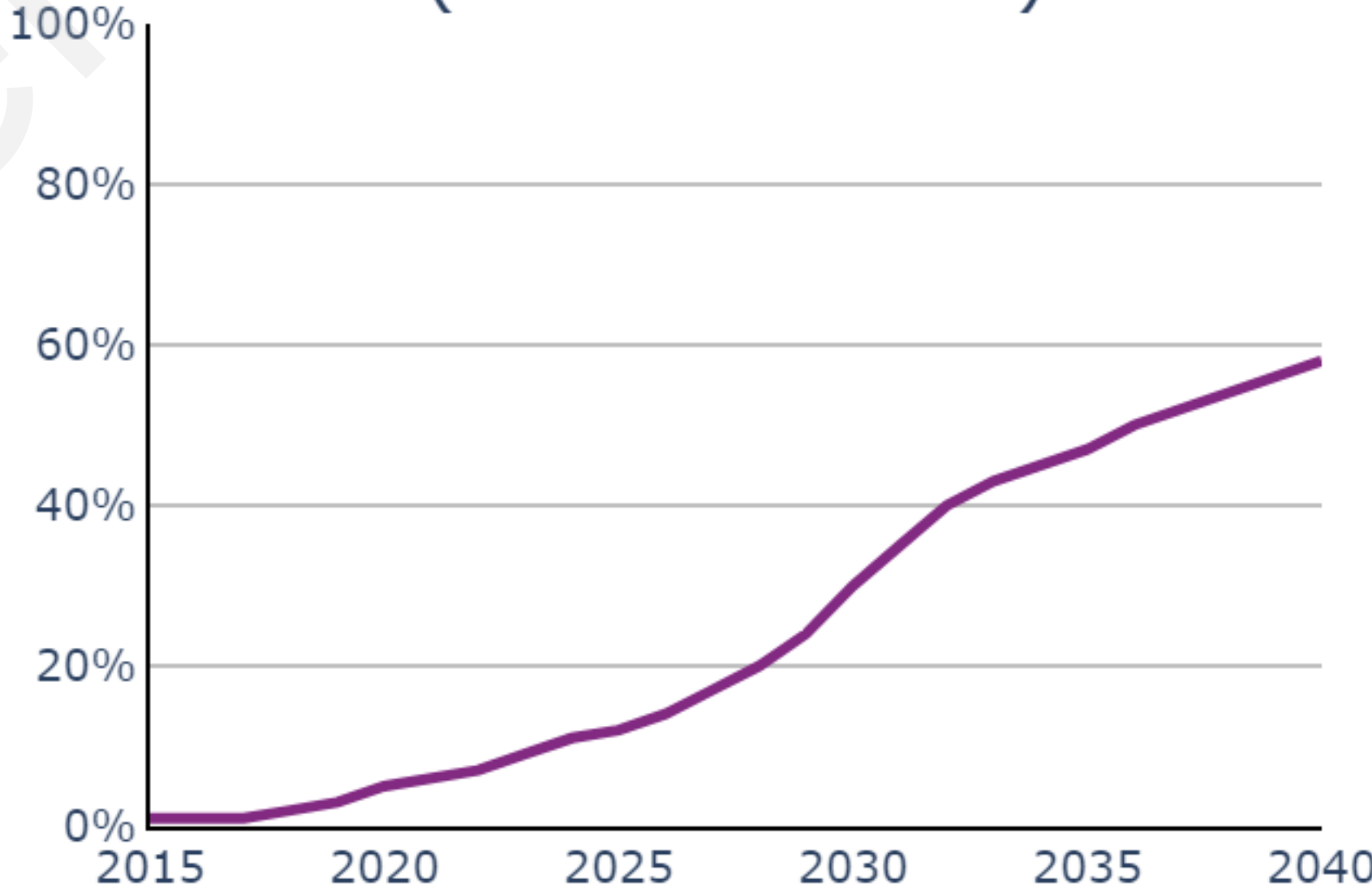
Gross Output: Gas Utilities



Micro

Demand change within the same sector

Global share of annual EV sales (vs ICE vehicles)



Source: BloombergNEF

Shifting away from products or towards alternatives within the same sector

Fashion & apparel



Food

Transport



Packaging

What does this mean?

- Loss of sales/revenue
- Stranded assets
- Reputational damage

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Changing behaviour means new opportunities

Fashion & apparel
Sustainable material & circularity



Food
Plant-based alternatives
& reducing waste



Transport
Renewable transport methods

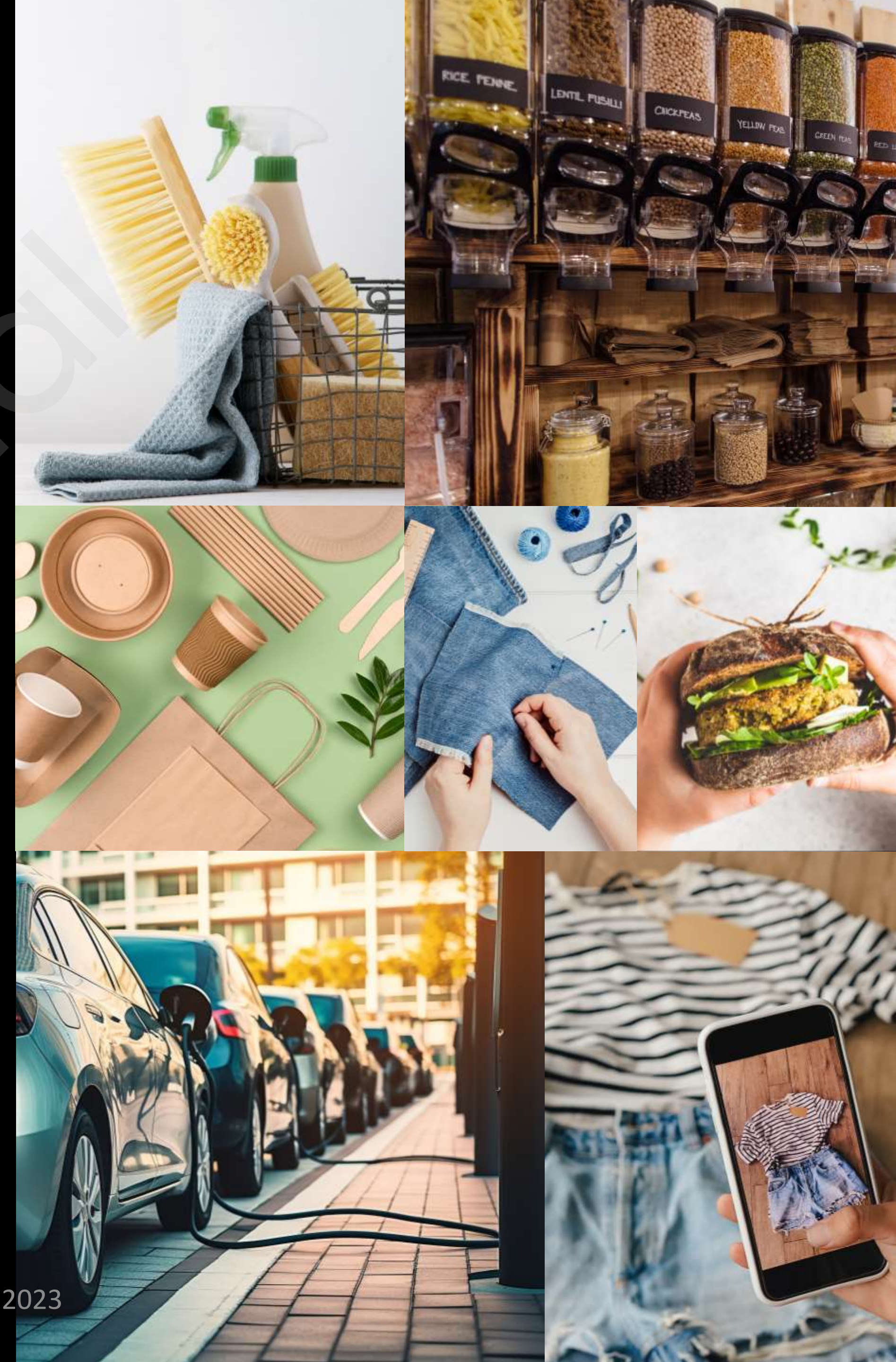


Packaging
Recycled & recyclable



Be ready to harness the opportunities

- Access to new markets and consumers
- Could reduced operational costs
- Enhanced brand reputation



THANK YOU

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