



campaign

Time to give back

Should sustainability influence media choice?

Brands want media channels to show sustainability – but they don't yet believe channel choice is important in meeting their own sustainability goals



JCDecaux

The world is in a race against time to meet net-zero targets. The climate crisis is real, getting worse and can only be alleviated if every industry embraces a collective responsibility to rise to the challenge. It is no longer about doing just enough, it is about doing *more* than enough.

Can advertising industry do more?

So, is the advertising industry doing enough? Are marketers sufficiently interested? If they are, are they acting on it? Specifically, are they using their power to choose media channels to drive sustainability? Should they be?

JCDecaux UK – the outdoor media owner which has community pay-back in its DNA since its founder Jean-Claude Decaux came up with the idea in 1964 of providing bus shelters paid for by the advertising on them – is passionate about sustainability in its entirety. It defines it across the three pillars of ESG: environmental (carbon reduction/impact), social (giving back to the community, reaching diverse audiences) and governance (how a business is run, profitably and ethically).



ENVIRONMENTAL



SOCIAL



GOVERNANCE



What *really* matters to you

With the objective of understanding how brand marketers are currently approaching the issue, the company has commissioned Potloc to survey 200 marketers in the UK. It asked which channels marketers think are most sustainable – and the aspects that matter most.

Their answers, outlined below, are illuminating. But anonymous. To find out more, JCDecaux partnered with *Campaign* and brought brands, media agencies and Out-of-Home (OOH) specialists, who were not part of the original research group, together around a table to discuss the results and add their analysis of what's going on and why. Their views are added to the findings of this report and their additional thoughts are in this article.

The aim of the survey and the in-person debate was to start a conversation about the role of sustainability in channel planning. The response to both was manifestly clear: this is happening now and there's a huge appetite for more. More information, more knowledge, more action.

What are marketers saying?

“We carried out this Time to Give Back study because we believe that sustainability should make a difference when it comes to media channel planning,” says Mark Bucknell, chief commercial officer at JCDecaux UK.

The results show that the bulk of brands haven't yet made that connection between their own sustainability goals and their choice of media channel.

Marketers reveal in the study that the top three sustainability factors that they want from media owners are: carbon reduction, the ability to reach diverse audiences and giving back to the community – yet, less than half of marketers questioned think channel choice is important when it comes to meeting sustainability goals.

In fact, when it comes to the factors that contribute towards the choice of media channels, sustainability is virtually last on the list, ahead only of price, according to the 200 digital marketers polled.

“This is remarkable when you consider that consumers' expectations of businesses and brands have changed, shaped by concerns around diversity and inclusion, climate change, social justice and the need for trust in our institutions – and when you learn that more than half the marketers in our study say it is important that their investment delivers more than just advertising,” Bucknell says.

“More than half the marketers in our study say it is important that their investment delivers more than just advertising”

Mark Bucknell

Chief commercial officer
at JCDecaux UK

What is OOH doing?

When asked which channel is the most sustainable, OOH ranks top, with 34% putting it in first place and 60% placing it in their top three. This is perhaps due to its relatively well-known community benefits: an estimated 50p in every pound spent on OOH goes back into the community towards public services, such as free bus shelters, on-street defibrillators, free public Wi-Fi and providing valuable revenue streams to transport partners to help keep ticket prices down. And OOH has a virtuous business model. The advertising it carries stimulates economic growth while also giving back to society through the investment it funds in our towns and cities.

But there is another critical reason why marketers should care more about OOH, the industry would argue: it is more respectful of its environment. Among media channels, it generates the fewest CO₂ emissions per 1000 impressions, according to a [KPMG study in France](#) and a [report in Germany](#). As a one-to-many broadcast channel, thousands of people can see a single ad. Maximum impact, limited output. Reaching hundreds of thousands of people with just one ad, OOH advertising is on a mission to reduce its carbon impact.

It has a head start. The biggest OOH media owners have signed up to ambitious advertising industry commitments that align with robust net-zero targets. From 100% renewable energy in media-owned sites, screens that are powered down at night, greener materials in ad boards, advanced lighting (particularly at bus shelters) and tech that monitors and improves local air quality, OOH has sustainability at its heart.



50p in every pound spent on OOH goes back into the community

What now?

“I’d like the Time to Give Back report to be a call to arms to marketers to re-imagine their media channel choice to include sustainability goals,” says Bucknell. “To use their advertising investment to give back to the community, and to choose the media channels that deliver best for their marketing and their sustainability goals.”

While advertisers can influence customer behaviour and drive positive change, the OOH industry believes brands themselves also have a powerful role to play in creating a more sustainable and responsible future for all. And OOH can help.

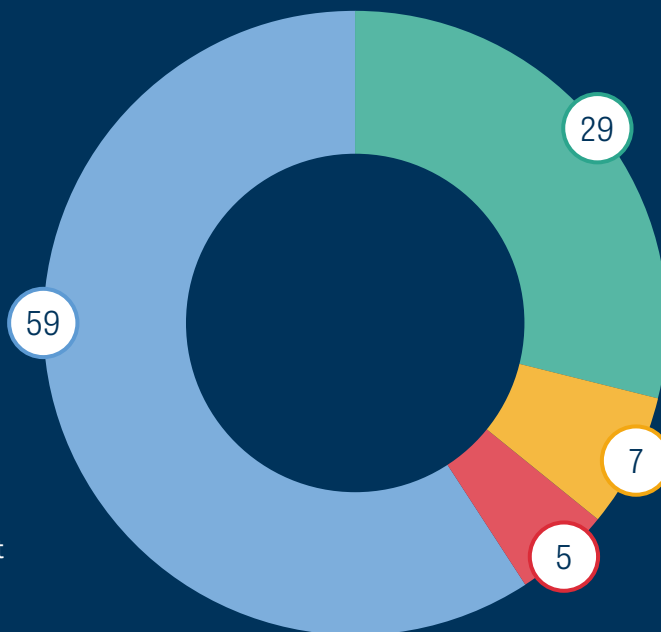
THE STUDY

Time to Give Back

The 200 marketers polled revealed themselves to be split into four groups

Sustainability-strivers

They recognise the importance of sustainability but other factors take priority. They account for around 59% of marketers questioned.



Sustainability-changemakers

They see sustainability as a priority and account for around 5% of marketers in the study.

Sustainability-stragglers

They are sitting on the fence and doing little about it. They account for around 29%.

Sustainability-deniers

They see sustainability as unimportant to media planning and make up around 7% of the total surveyed.

KEY FINDINGS

Time to Give Back shows that while marketers say sustainability is important, it isn't translating into action when it comes to media channel choice

PRIORITIES

- **Marketers' top three sustainability attributes are: 'carbon reduction', 'reaching diverse audiences', and 'giving back'.**

Marketers say the top three attributes of sustainability they look for in media owners are: carbon reduction (67%), the ability to reach diverse audiences (59%) and supporting the community (55%).

- **Sustainability is low on the list of priorities when it comes to media channel choice.**

Marketers say sustainability is important, yet it is almost last on the list in terms of influencing media choice – behind audience targeting, speed-to-market, effectiveness, brand safety and measurement. Only price is ranked lower.

ACTION

- **More than a third of marketers say they have not changed their media channels to meet sustainability goals.**

CARBON REDUCTION

- **Nearly half (43%) of marketers don't think their media channel choice is important for achieving their carbon neutral/net zero goals.**
- **Marketers are confident about their knowledge of the carbon impact of online but are less confident about their knowledge of other channels.**

GIVING BACK

- **56% of marketers say it is important that their media spend does more than just advertise.**

When then asked specifically about OOH, 69% of marketers agree it is important to them that the medium gives back.

- **More than half of marketers are aware that 50% of OOH revenues go back into the community.**

More than half (53%) of marketers are aware that OOH ad spend helps local authorities provide services and transport partners to keep ticket prices down, and 54% are aware it funds services such as free bus shelters, free public Wi-Fi and on-street defibrillators.

CHANNEL CHOICE

- **OOH is seen as the most sustainable media channel by marketers.**

Given that the marketers polled also say they have little knowledge about the carbon impact of OOH, the implication is that it is the social aspect, (giving back to the community, reaching diverse audiences) that is driving OOH's rating as a sustainable channel.

- **OOH generates the least CO₂ per 1000 impressions, compared to other media channels.**

Marketers agree that they believe the results of a ([German](#)) study which found that OOH generates the least CO₂ per 1000 impressions, compared to other media channels.

To see the full research go to [page 11](#)



THE CAMPAIGN & JCDECAUX

Dinner debate



With a view to finding out more about the potential reasons for the answers marketers gave in the survey, JCDecaux partnered with Campaign and brought brands, media agencies and OOH specialists, who were not part of the original research group, together around a table to discuss the results and add their analysis of what's going on and why. They were told they could be anonymous so that the debate was as full and frank a discussion as possible. Here is some of what they think is the state of play with sustainability.

Soundbites from around the table

Does sustainability play a part in the choice of media channels used in ad campaigns?

Participants in the *Campaign/JCDecaux* debate say sustainability is a factor when it comes to choosing

media channels but that it is just one of several and does not yet have a deciding role.

Effectiveness is still the primary deciding factor, and while consumers retain an ambivalent attitude to sustainability, brands can sit on their hands, most agree.

Jake Kalliath, co-founder of OOH specialist Mediabridge, says a domino effect will occur which younger people will drive.

Scott Somerville, head of brand and marketing at EON, believes sustainability is no longer a niche interest and that post-pandemic, and with the cost of living crisis, it has gone mainstream. As consumers start to exert pressure on sustainability, brands need to have a credible position.

Are the top three sustainability attributes (carbon reduction, reaching diverse audiences, and giving back) surprising?

As different organisations are at various points on their sustainability journeys, priorities differ, according to those around the table.

There is some scepticism about the validity of tools such as carbon calculators but, at the same time, a desire for methods that can provide a greater degree of transparency around sustainability.

“Bringing it back to carbon calculators and one number doesn’t do it any justice” says Sophie Pemberton, group chief strategy officer at Talon, “but clients do want those numbers to compare – it’s insane.”

Sustainability is low on the list of priorities when it comes to media channel choice. Why so?

Despite the evident passion about sustainability in the room, this was not a surprise to marketers as it is not yet definitive.

Pia Kingan, media strategy director at Sky, says sustainability is just one consideration for brands. “Sky is passionate about sustainability but my responsibility is to grow the brand. It’s a mitigating factor but not ultimately the main factor at this point.”

Everything feeds into channel choice, she says, “but effectiveness has to be number one.” Adds EON’s Scott Somerville: “Marketing channel choices always come down to cost.”



Over a third of marketers say they have not changed their media channels to meet sustainability goals, indicating that 64% have.

This finding is met with a degree of scepticism by the assembled group.

“A lot of people are not being truthful. [Sustainability] is just not in the briefs,” according to Dan Plant, chief strategy officer at Starcom, who says budgets are not going into OOH despite its laudable sustainability claims. “It’s not always a priority for clients. Being good or bad doesn’t touch their bottom line.”

How does OOH compare with other media on sustainability?

A study claims to show that OOH has a better record on sustainability than other media, but the group is disinclined to simply accept one study, as it could easily be contradicted by another, or the methodology could be pulled apart to reveal a less impressive picture.

It is felt that the bigger picture should not be about finding the “bad guy” but in finding genuine ways for brands to reach their goals more sustainably, and, as is always the case in marketing, that depends on a whole host of factors – what you are trying to achieve, the target audience, the budget and so on. What works for one brand in one situation will not work for another with a different goal.

Overall, there’s a huge appetite for more among all of our debaters. More information, more knowledge, more action.

[Click here](#) to read the roundtable write up.



Georgina Bramall

Marketing strategy director, Giffgaff

“Sustainability is not a department but part of the business culture [at Giffgaff]”

Ollie Joyce

Global chief transformation officer, Mindshare

“It will take transparency and standardisation of information to allow us to justify change”

Pia Kingan

Media strategy director, Sky

“It’s always going to come down to effectiveness so if there’s a way of feeding the importance of sustainability and ESG into the econometrics then it can start to affect high level decision making”

Nicole Lonsdale

Chief client officer, Kinetic

“The key messages have landed but we need to think what else we need to do to ensure that we share knowledge with each other in a clear and easy way”

Dan Plant

Chief strategy officer, Starcom

“Carbon and environmental impact are really tough to figure out. Think about media and its impact

on the world around more broadly and how OOH contributes to the ecosystem. There are media that do and media that don’t and as an industry we should be focusing on the media that puts value back in rather than extracts it”

Jawad Safdar

Growth marketing director, International, WEX Inc

“Until ESG matters to the majority of our audience or is regulated, brands won’t really make decisions based on it”

Scott Somerville

Chief marketing officer, EON

“There’s a lot of comfort that this is becoming a common conversation now and not a couple of us in a cupboard. But we need to watch that it doesn’t just become a conversation among ourselves and that it includes the customers”

James Thompson

Executive director, Manning Gottlieb OMD

“There is a clear passion about this space which inspires you to be louder and push the key decision makers more and be more vocal to get action off the ground”

Next steps

A view from Chris Dooley, head of social impact, JCDecaux UK

It was hugely insightful to share the Time to Give Back results at a roundtable event attended by leading media agencies, specialists and brands who generously shared their views about sustainability.

What particularly resonated with them was the finding that marketers' priorities include: the ability to reach diverse audiences and "giving back" to the community – areas of strength for OOH, which was also named as the most sustainable channel in this report.

What do the findings of Time to Give Back mean for marketers? Here are three things I'd like to see happen:

1. For marketers to recognise the power of their advertising investment to do good – and to rebalance spend towards the channels that give back to communities.
2. While metrics such as audience targeting and effectiveness are always the priority, I would like to see more conversations around media channels that can deliver against marketing and sustainability metrics.
3. "It's our job as brand marketers to tell procurement that social value is essential." These were the words of a round table participant, sharing that most focus is currently on production and materials, rather than media.

How likely are we to see changes any time soon?

I think there are grounds for optimism – after all, **64%** of marketers say they have changed media channel choice to meet sustainability goals. At our roundtable, there was huge interest in the ability of channels to reach diverse audiences. One participant even suggested that marketers might pay more to ensure that their media spend is doing good in the community.

In a multichannel world, OOH can help meet these aims – as a sustainable platform that connects with consumers, maintains and builds brand values and supercharges the effectiveness of other channels too, all while giving back 50p in every pound spent on it.

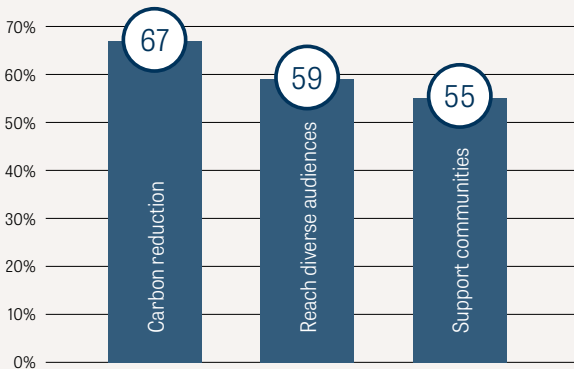
So, if I had one wish for Time to Give Back, it is that it can be a catalyst for change, sparking conversations about how marketers can take the opportunity to re-imagine and reshape their media channels. After all, as one brand marketer in our discussion said: "It's everyone's job to be sustainable".



64% of marketers say they have changed media channel choice to meet sustainability goals

TIME TO GIVE BACK – THE DATA

WHAT ARE THE THREE MOST IMPORTANT ASPECTS OF SUSTAINABILITY WHEN SELECTING MEDIA CHANNELS/MEDIA OWNERS?

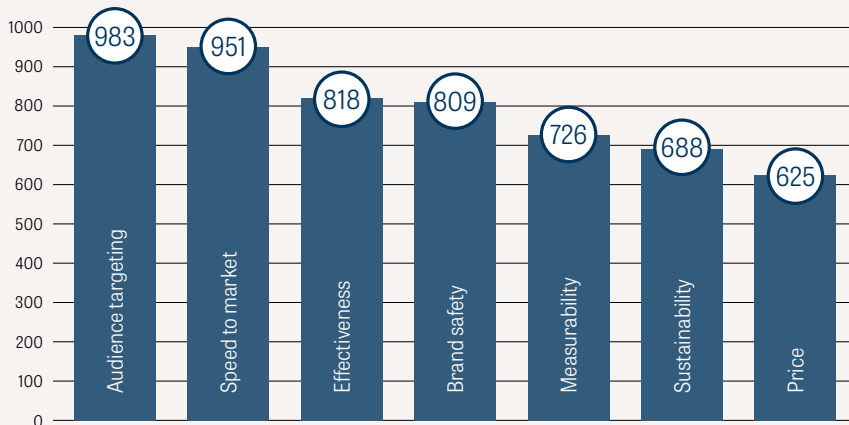


Take-out

Marketers say the top three most important aspects of sustainability are carbon reduction, the ability to reach diverse audiences and giving back to the community.

WHAT ARE THE KEY DECISION-MAKING FACTORS BEHIND MEDIA CHOICE?

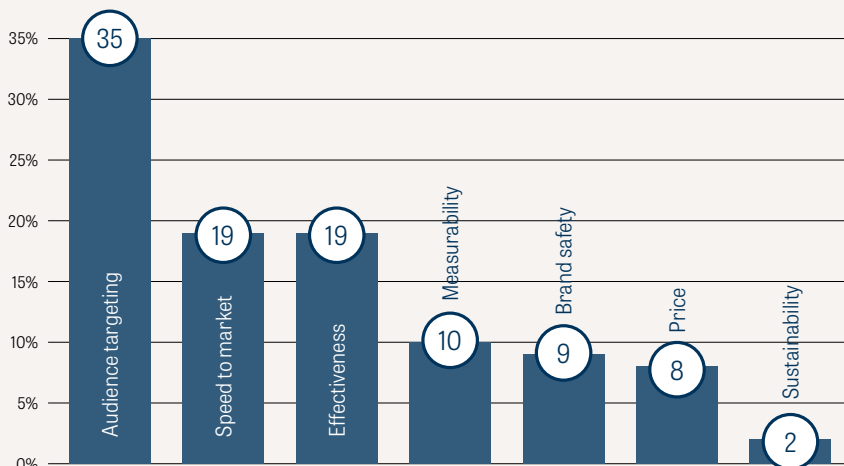
Weighted average rankings from 1 to 7, with 1 being the most important



Take-out

For marketers, sustainability still comes low on the list compared to other priorities when it comes to media choice. Only price is ranked lower.

This chart looks only at first place rankings

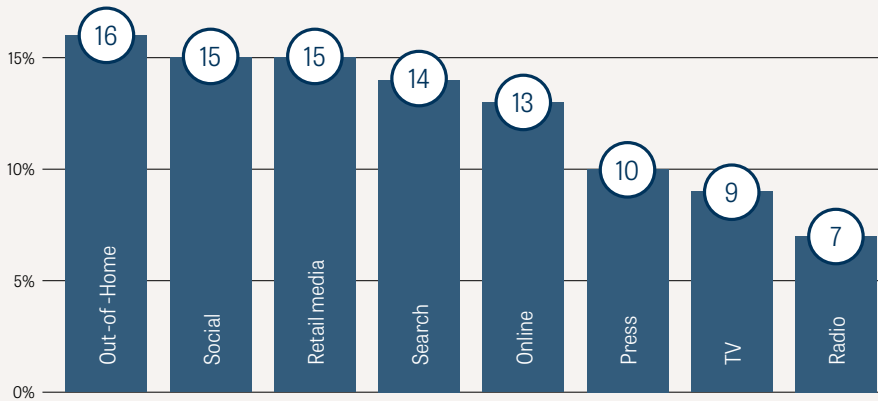


Take-out

Looking only at what is ranked in first place, audience targeting comes out as the most important factor by **35%** of marketers, with sustainability only ranked by **2%** of marketers as the most important factor.

WHICH CHANNEL DO YOU BELIEVE TO BE THE MOST SUSTAINABLE?

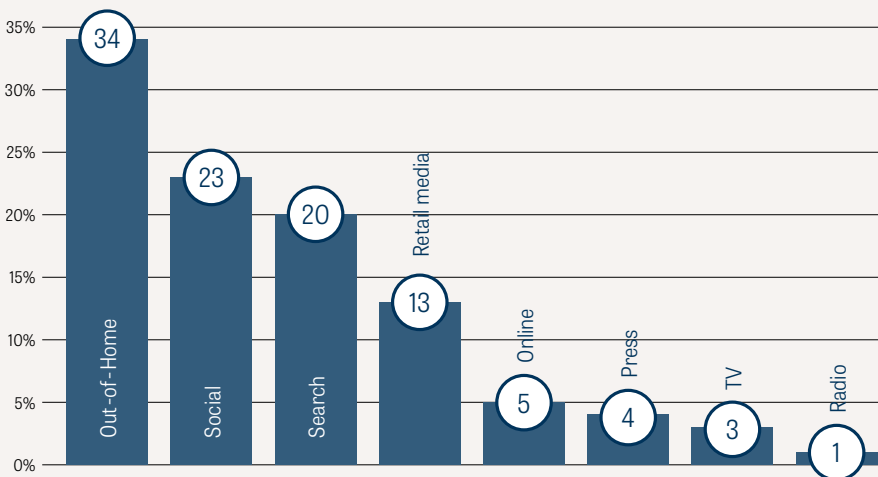
Weighted average rankings from 1st to 8th place



Take-out

OOH is ranked by marketers as the “most sustainable channel” when asked to compare with a number of others.

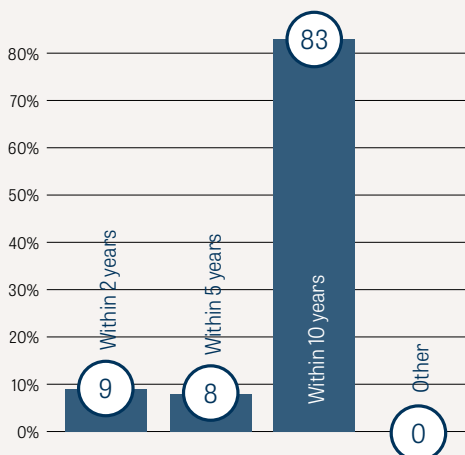
This chart looks only at first place rankings



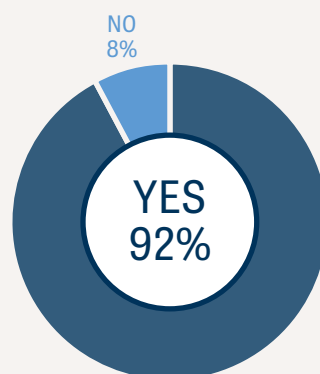
Take-out

OOH was ranked by marketers as the “most sustainable channel” with 34% of people putting it in first place and more than 60% ranking it in their top three.

WHEN WILL YOUR COMPANY ACHIEVE CARBON NEUTRALITY AND/OR NET ZERO?



DO YOU HAVE A PUBLIC TARGET FOR REACHING CARBON NEUTRALITY AND/OR NET ZERO?

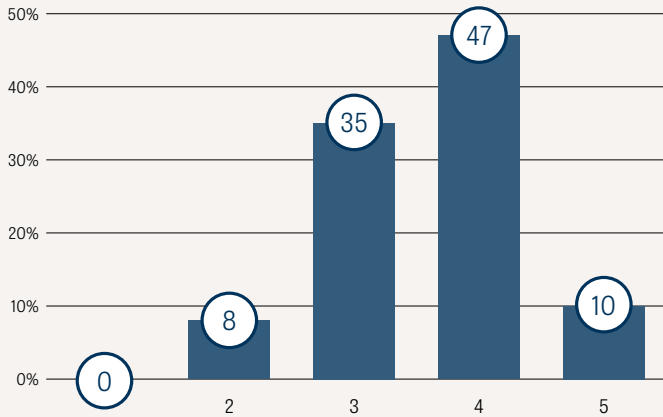


Take-out

Almost all the marketers (92%) surveyed say they have a public target for reaching carbon neutrality/net zero. This is more encouraging than a study for [Accenture in November 2022](#) which found only 34% of the biggest global companies have a target and nearly 90% will fail to meet their objectives if they don't at least double the pace of emissions by 2030. Marketers in the Time to Give Back study say they will achieve it within ten years.

HOW IMPORTANT IS YOUR CHOICE OF ADVERTISING MEDIA IN REACHING YOUR GOAL OF CARBON NEUTRALITY AND/OR NET ZERO?

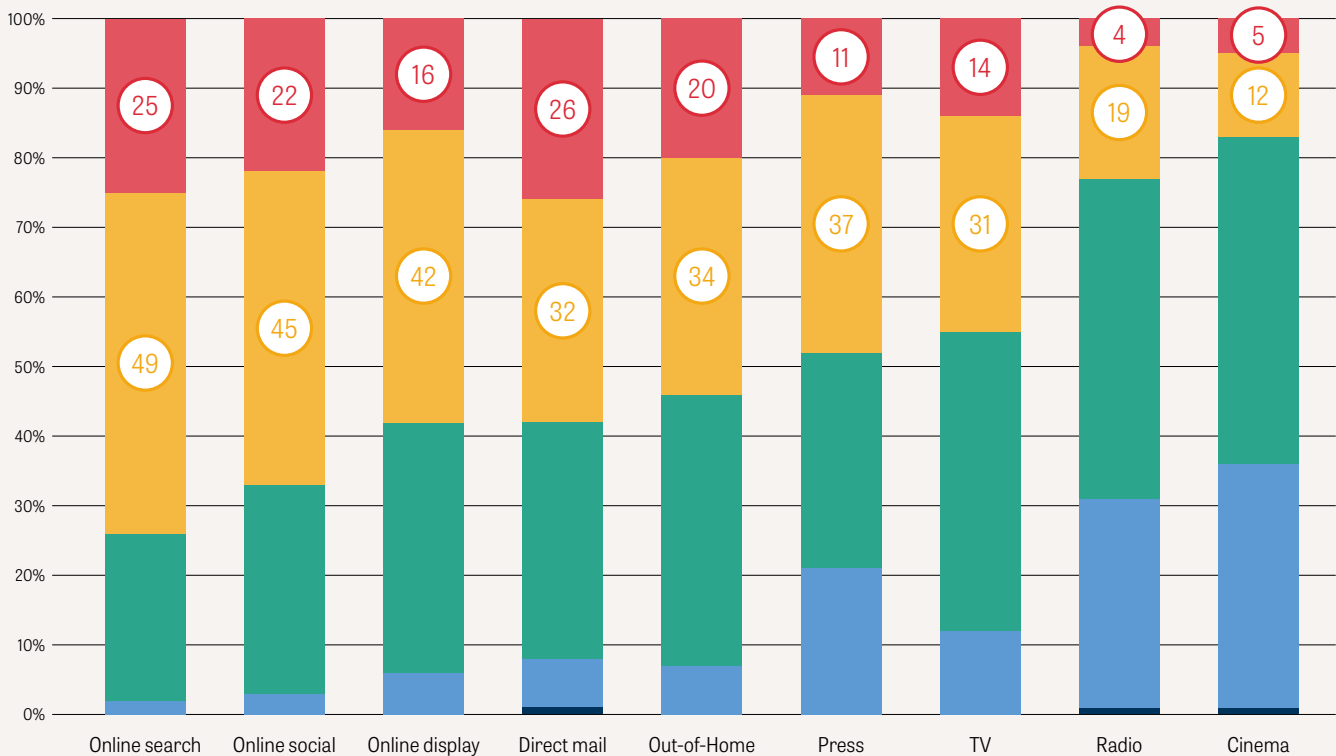
Where 1 is not at all important and 5 is extremely important



Take-out

Nearly half of marketers don't think it's very important to consider media channel choice when it comes to reaching their Net Zero Goal.

HOW AWARE ARE YOU OF THE CARBON IMPACT OF THESE MEDIA CHANNELS?

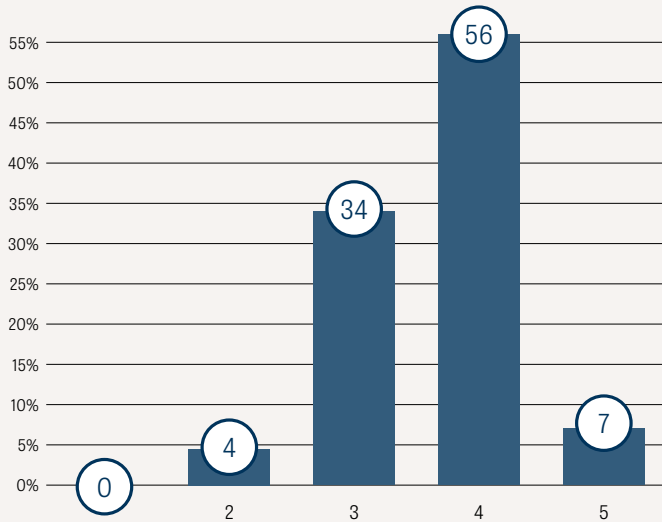


Take-out

Marketers feel confident about their knowledge of the carbon impact of some channels – mainly online. More than 70% say they are extremely/very aware of the impact of online search and 67% say the same for online social but they aren't as aware when it comes to channels such as OOH, press, TV, radio and cinema.

DO YOU AGREE THAT YOU HAVE CHANGED MEDIA ALLOCATION BASED ON SUSTAINABILITY GOALS?

Where 1 is strongly disagree and 5 is strongly agree

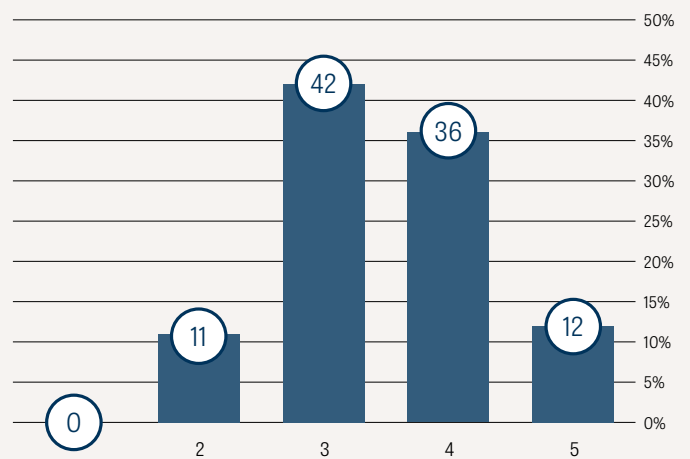


Take-out

Only **7%** of marketers strongly agree that they have changed media allocation due to sustainability goals.

DO YOU BELIEVE A REPORT THAT OOH GENERATES THE LEAST CO₂ PER 1000 IMPRESSIONS COMPARED TO OTHER MEDIA?

Where 1 is not at all believable and 5 is extremely believable

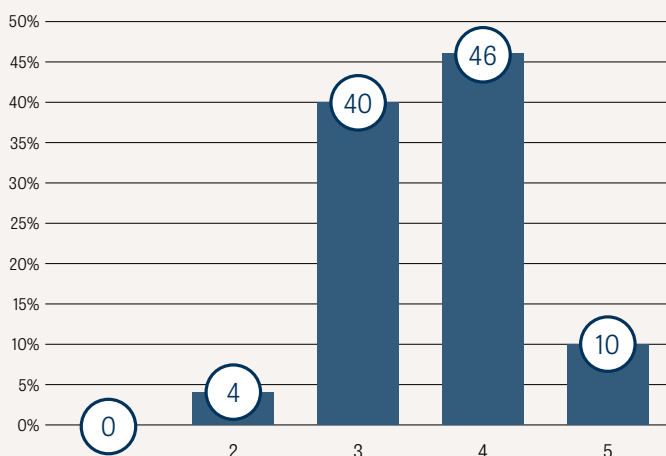


Take-out

Marketers agree that they believe the results of a (German) study which found that OOH generates the least CO₂ per 1000 impressions, compared to other media channels.

HOW AWARE ARE YOU THAT SOME MEDIA CHANNELS GENERATE REVENUE FOR GOOD CAUSES?

Where 1 is not at all aware and 5 is very aware

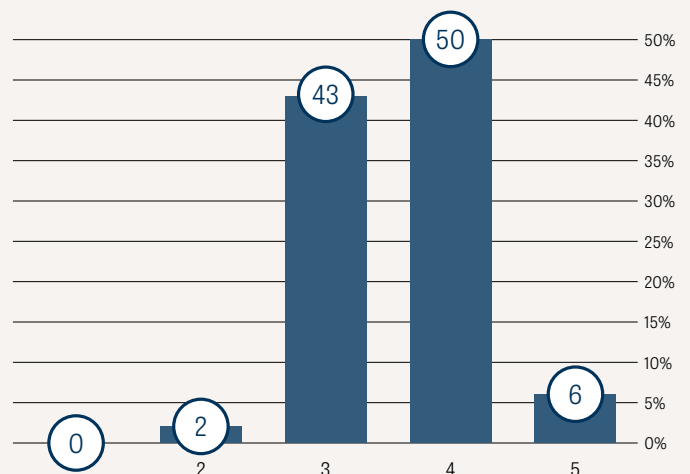


Take-out

Marketers say they are aware that media channels generate revenue for good causes with **56%** ranking themselves as very/extremely knowledgeable. That still leaves **44%** who admit they are unsure.

HOW IMPORTANT IS IT THAT YOUR MEDIA SPENDING ALSO FUNDS MORE THAN YOUR ADVERTISING?

Where 1 is very unimportant and 5 is very important



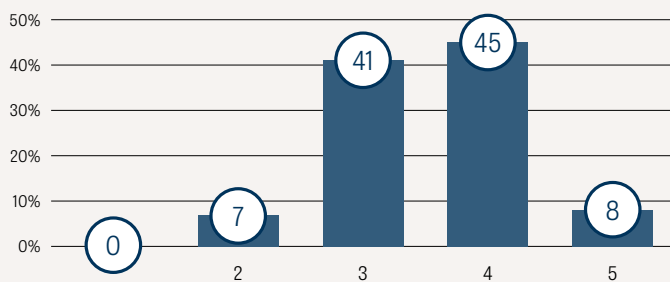
Take-out

When asked about the importance of giving back, **56%** of marketers agree it is very/extremely important that their media spend does more than just advertise.

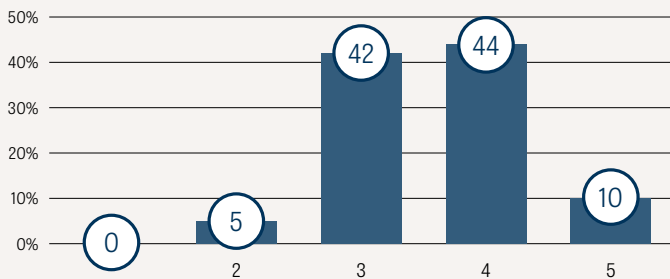
HOW AWARE ARE YOU OF THE FOLLOWING ATTRIBUTES ABOUT OUT-OF-HOME MEDIA?

Where 1 is very unaware and 5 is very aware

A) 50% of Out-of-Home revenue goes back to the community, providing local authorities with revenue streams for the provision of local services and transport partners to keep ticket prices down



B) Out-of-Home funds services such as the provision and maintenance of bus shelters, free public Wi-Fi, on-street defibrillators, free device charging, free phone calls



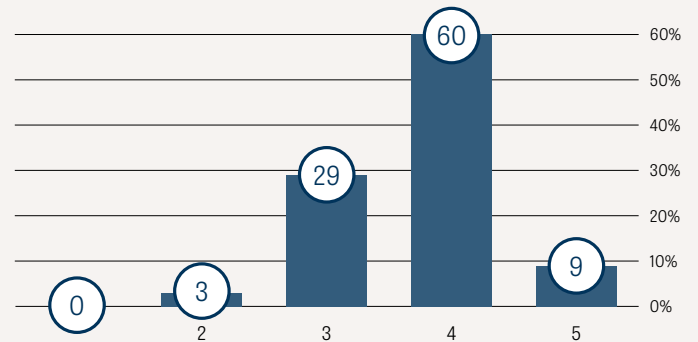
Take-out

Only **53%** of marketers are aware that 50% of OOH revenues go back into the community – and the same amount (**54%**) are aware that OOH funds services such as free bus shelters, free public Wi-Fi and on-street defibrillators.

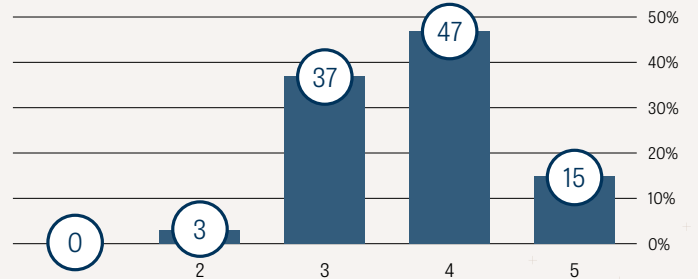
HOW IMPORTANT ARE THE FOLLOWING ATTRIBUTES ABOUT OUT-OF-HOME MEDIA?

Where 1 is not important and 5 is very important

A) 50% of Out-of-Home revenue goes back to the community, providing local authorities with revenue streams for the provision of local services and transport partners to keep ticket prices down



B) Out-of-Home funds services such as the provision and maintenance of bus shelters, free public Wi-Fi, on-street defibrillators, free device charging, free phone calls



Take-out

When asked about OOH, **69%** of marketers agree it is important to them that **50%** of OOH revenues go back into the community.



campaign

JCDecaux