

**MAGNA**

IPG MEDIABRANDS

**SUSTAINABILITY**

**KANTAR**

# **Sustainability and Purpose**

PAVE the Path-to-Purchase

# Introduction

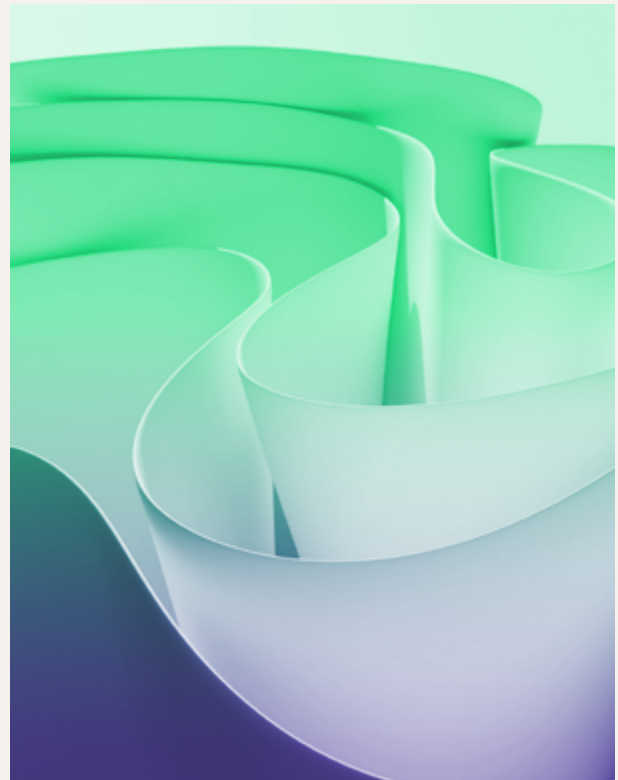
The 2020s have been a turbulent and uncertain decade so far. A global pandemic, wars, inflation, political instability, and a cost-of-living crisis have all contributed to a sense of -

## ‘Permacrisis’

Indeed, the only constant citizens and brands can be sure of is change. Among these other challenges, we are also increasingly facing the sobering realities of climate change, with temperature records continuing to be broken around the world and the Intergovernmental Panel on Climate Change (IPCC) underlining humanity’s “code red” status in 2023.

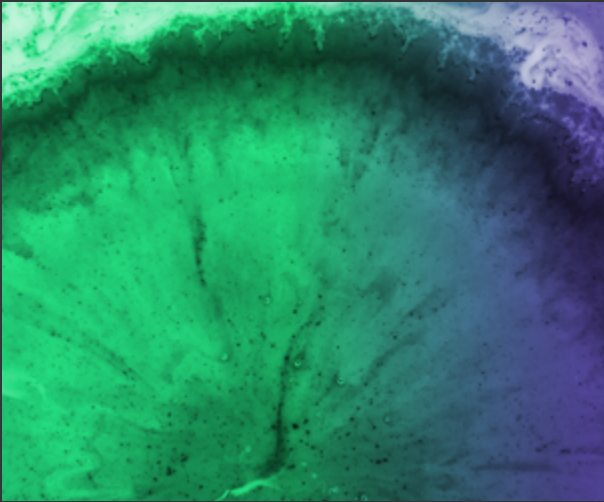
The advertising and media industry has, certainly in the last few years, started to recognise its role in reacting meaningfully to the climate and ecological crises, Global initiatives such as [Ad Net Zero](#) have proven to be useful frameworks to rally the industry and start to embed sustainability within business strategies. The industry’s focus for the last 18 months has been on the decarbonisation of the production, distribution and publication or promotion of advertising itself and while this is certainly important, there is a [growing consensus](#) that we are not pushing hardest where we have historically proven our effectiveness: [behaviour change](#).

As the world transitions rapidly in the coming years and decades to a lower-carbon economy, unprecedented behaviour changes will be required in society. Governments undoubtedly have a central role to play in setting the playing field,



but businesses will be another key driving force behind those changes, powered by the trillions of dollars they spend annually on their communications. Media and advertising professionals therefore have a responsibility to adapt to this changing landscape, in partnership with our clients.

Advertisers already understand this; more than [80% of FTSE 100 companies](#) have made public commitments to reach Net Zero carbon emissions by 2050. And yet, sustainability has until recently been the domain of legal, procurement, financial and operational divisions within companies, with marketing often lagging behind. In a [recent WFA survey](#), [93% of marketers](#) said that their department could make a difference to sustainability, but only [10%](#) of marketers claimed to be “well advanced” in their sustainability journey. This “intention-action” or “say-do” gap within advertisers is reflected throughout the media and advertising ecosystem. It also presents a missed opportunity given [76% of UK residents](#) say they are concerned about climate change to some extent.



# Customers are looking to brands for leadership on sustainability.

## 81%

of shoppers want to buy environmentally sustainable products, but believe brands need to make the “greener” choice also the “easier” choice from an availability or cost point of view.

## 67%

of shoppers in the UK believe that companies are responsible for addressing climate and environmental issues.

[Kantar Global Issues Barometer, 2022](#)

It is clear then that more needs to be done to bridge the intention-action gap within our industry. Advertisers must be empowered to leverage their own sustainability credentials in their communications, abiding by local regulations and within their own specific category context, to meet the needs and expectations of potential customers.

This is what will ultimately enable the private sector to drive the [broad behaviour changes](#) that are required in society to address the climate and ecological emergencies.

We set out to understand how sustainability could be a driver of both short-term sales and long-term brand equity and how a focus on sustainability within communications could support future business success.

Our findings demonstrate that brands can be both **purposeful** and **profitable** by leveraging sustainability throughout the path-to-purchase. Across all five verticals, we saw that **Sustainability concerns were drivers for both brand affinity and purchase consideration** - to varying degrees depending on audience and category. Therefore **sustainability is no longer a “nice to have” or an “add-on”, it needs to be a fundamental strategy within holistic communications planning. It needs to be part of everyone’s job.** Citizens of all generations and backgrounds are already demanding more from brands - and we do not see this trend reversing over the coming years.

**This white paper summarises the results from our new research “Purposeful Purchase Journeys” (PPJ), conducted across five different industries in the UK through a partnership between IPG Mediabrands’ Sustainability Practice, MAGNA UK, Kantar & Google.**

# Methodology

In the research “Purposeful Purchase Journeys (PPJ)”, Kantar invited 5,066 UK shoppers, aged 18+ to participate in a 15-minute online survey covering these five different product categories:

- Meat-free Food
- Home Electronics
- Finance
- Beauty
- Sportswear

Fieldwork was conducted from Q4 2022 to Q4 2023 and was designed to allow a representative view on each category. The large sample size allowed us to identify different behavioural patterns at brand level and also by generations.

In alignment with the [UN's 17 Sustainable Development Goals](#) (SDG) Framework, our “Purposeful Purchase Journeys” (PPJ) defines sustainability as various potential activities from brands such as environmental care, or climate-responsibility, but also Diversity, Equity, and Inclusion (DEI), and ethical brand behaviour - in short: it's the “Why, What, and How” of a brand's purpose.

Our PPJ research uses an implicit choice model to quantify the importance of purchase drivers, either aligned to purpose and sustainability, or established, non-sustainable ones. In this way, we were able to assess the relative importance of all

drivers throughout the purchase journey, and across audience demographics.

Our PPJ research uses implicit and analytic methods to enrich the attitudinal data collected in this research to account for the “intention-action” or “say-do gap” – the difference between how important consumers say sustainability is to them in theory, versus how they act in real purchase situations. To avoid overclaiming the relevance of sustainability based on purely declarative data we identified the influence of sustainability through an implicit choice model, and then the influence of sustainability on brand perception via advanced analytic analysis (driver and correlation analysis). In this way, we were able to quantify the importance of purchase drivers, either those aligned to purpose and sustainability, or the established, non-sustainable ones.

Let's take **Home Electronics** as an example. We incorporated 24 different purchase drivers in the implicit choice model to identify how much more - or less - important sustainability was compared to non-sustainable drivers. Examples of sustainability-related drivers are “fair trade”, “fair working conditions”, “made of recycled material” or “resource-saving production” and examples for established, non-sustainable ones are “high quality”, “availability” or “price”.

We will explore other categories and the data in more detail throughout this whitepaper.

Additional reference sources include Kantar's Brand Equity Framework, Global Issues Barometer, BrandZ Analysis, and creative Link+ Database.

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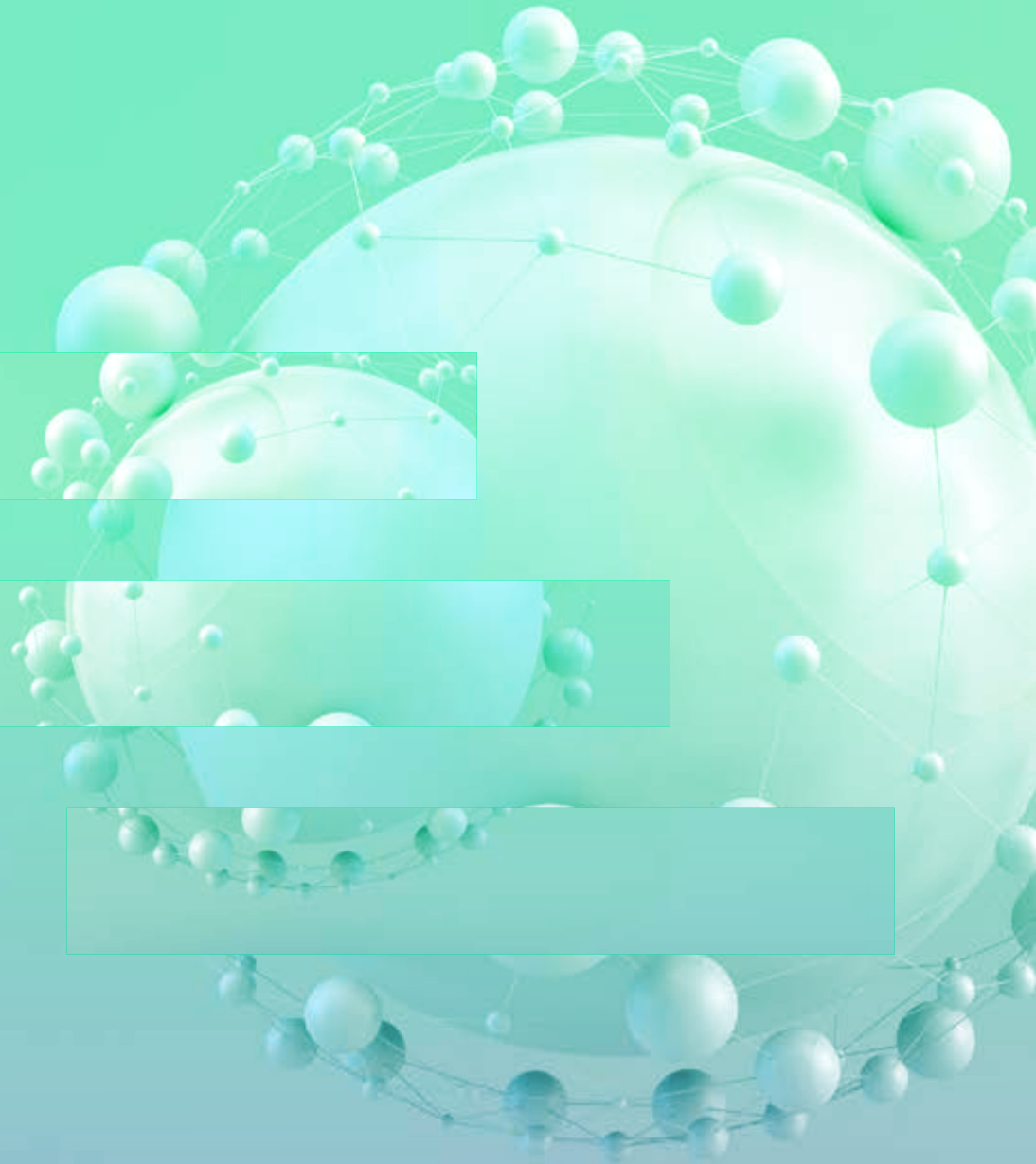
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# Sustainability as Brand Differentiator

# Sustainability is a hallmark of strong brands,

and in times of uncertainty the importance of being a strong brand could not be clearer. Based on Kantar's validated and certified [BrandZ Framework](#), we see not

only that strong brands can command a price premium, but that they also have a 9x higher volume share than brands with a weak brand equity.

Additionally, strong brand equity has also proven to be one of the strongest resilience factors for brands following the economic crises of 2008 and 2020. In such uncertain times, strong brand equity has therefore never been more important for brands to thrive and survive.



Performance of top brands over time acc. to MSCI World Index, S&P 500 and Kantar BrandZ strong brand portfolio. Kantar's BrandZ framework has proven to be the strongest predictor for long-term brand growth, and those brands that adhere to the Kantar BrandZ framework for strong brands will bounce back even faster following an economic crisis.

The latest [BrandZ 2023](#) analysis from Kantar also found that the financial value of sustainability now accounts for

# \$193

Billion USD among the Global Top 100 brands. This means that sustainability has become one of the most important drivers of corporate reputation, and now accounts for up to

# 10%

of the overall equity of a brand. This is driven by an increasing citizen desire

for sustainable brands with shopper endorsement of sustainability perceptions having risen by

# 84%

in the past 10 years.

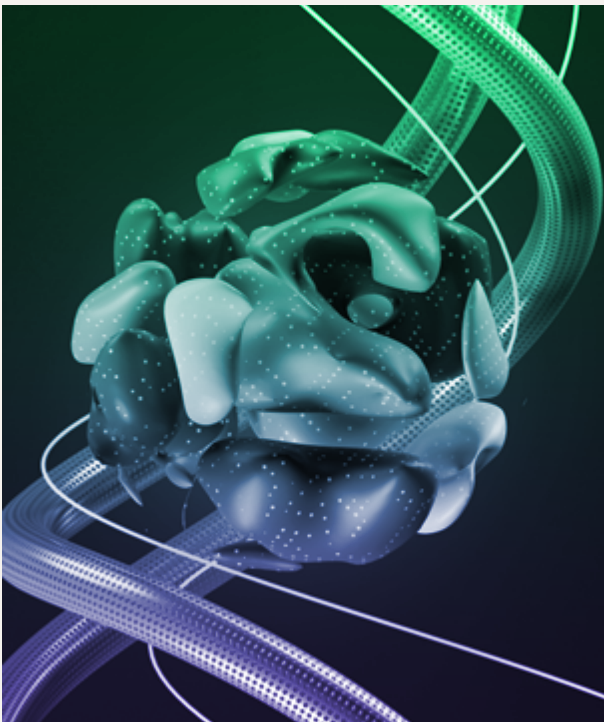
In addition, high Sustainability scores are correlated with revenue growth and business performance as shown by a recent [Bain report](#) which found that companies with high ESG scores achieved 5x the revenue growth of those with poor scores.

These impressive statistics encouraged us - IPG Mediabrands, Kantar, and Google

- to conduct our own research “Purposeful Purchase Journeys” as we fundamentally believe, and can now prove, that Brand Purpose is not just “another tick box on a to-do list” or “another advertising campaign” for brands.

It has become a central pillar of business strategy and a powerful future-facing tool for brand managers to drive both brand perception and growth, aligned to evolving customer demand.

Take **Home Electronics** as an example: while a brand’s technical excellence or innovation may have set it apart from its competition historically, challenger brands have increasingly launched high-quality and innovative tech at lower price points. The world is starting to recognise that energy is not an endless resource and often poses a huge climate risk. Yet, new home appliances products still actually need more energy than previous generations, even if they are labelled as energy-efficient.



Truly energy-efficient products, and potentially those produced in an energy-efficient supply chain, with renewable

energy sources front-and-centre may become a strong driver of brand differentiation, since we see that shoppers do already take this into consideration.

In the **Food category**, on-shelf availability, convenience and portfolio range were proven to be strong purchase drivers. With the rising cost of living, environmental concerns and increasingly uncertain supply-chains, shoppers have started to take new purchase drivers into consideration. Energy-efficient production methods, local provenance, animal welfare, ethical brand behaviour and DEI credentials are now emerging as increasingly important drivers of both Brand Perception and Purchase Consideration.

These examples illustrate the fundamental changes brands will have to learn to navigate. What has worked well historically to drive a strong, differentiated brand and business success, may no longer be enough in the future.

However, there is no silver bullet, no simple pattern that brands across categories can easily apply. We found this to be much more exciting - and challenging - because, in fact, sustainability has an individual and nuanced influence both across categories and within them, applying to individual brands within their category context.

Think of it as a ‘what-if’ scenario: if brands in a category focus on the right overarching strategy, then they can benefit from more: more trust, more excitement, more differentiation.

On the next page we have summarised the underlying patterns between sustainability in a category and how citizens perceive brands accordingly.



Category	To drive a positive brand perception in their category, brands should...	Brands that adhere to these guidelines will be perceived as more ...
Meat-free	...be perceived as sustainable, natural, and care for the future of the planet.	Trustworthy
Finance	...communicate values and beliefs shoppers care about, support the local economy and customers in financially challenging times to help communities thrive.	Preferred
Home Electronics	...communicate values and beliefs shoppers care about, invest in relevant sustainability commitments, promote DEI and care for the environment.	Exciting
Beauty	...communicate values and beliefs shoppers care about, care for the society and promote DEI.	Exciting
Sportswear	...invest in relevant sustainability commitments, promote DEI, care for society, offer products made of recycled material and be committed to the circular economy.	Different to other brands in the category

*Table shows how sustainability, values and DEI drive a more positive brand perception in the different categories. Sustainable brand drivers are shown in the order of their influence. Kantar identified these patterns of influence through advanced analytic driver analysis*

### For example:

A Finance brand's purpose can strengthen brand preference, which is critical in these uncertain times.

or

A Home Electronics brand can become more exciting by showing their stance on purpose.

We recognise the purpose of any strong brand should always be grounded in beliefs and values with which customers can connect. Depending on the category, these values may focus more on Environmental Care, DEI or Social Responsibility.

However, whichever core theme is prioritised, ethical behaviour and fair values

form the foundation of how brands shape their perception and make themselves future-proof.

**For now, and for the foreseeable future - sustainability credentials will be crucial and will continue to act as a "tie-breaker" between comparable brands within a category.**



**Product, Actions,  
Value, Ethics:  
The PAVE Framework**

A brand's purpose is only the start, however. The behaviours of the brand then need to align with that purpose across every touchpoint, and most importantly - the purpose needs to be effectively communicated to current and potential customers.

Many brands do this through "mission statements" on their website, and yet our research found that shoppers often feel that these are generic or abstract, with too little credible or concrete information about how

the brands turn this mission statement into reality. Being purposeful is a great start, but not enough to drive sales by itself.

In light of this, we have developed a holistic, actionable and clear framework to help brands activate their purpose: **PAVE**.

### **PAVE in action**

PAVE is an intuitive framework for brands to activate their purpose, make it actionable and establish it as the foundation for purposeful growth.



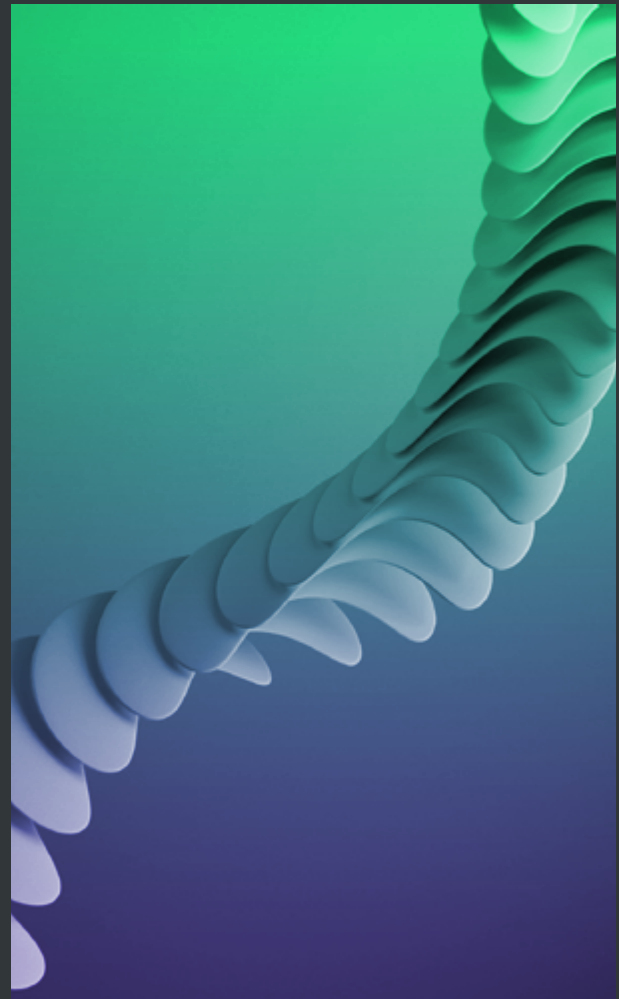
**Product** is the tangible, or physical outcome of the brand purpose. The proof points within the product or service that showcase the brand's willingness and ability to act upon their purpose direct to the customer. Shoppers can recognise this by, for example, the thoughtful use of resources in production, use of organic materials or sparingly used or recycled/recyclable packaging. It is an opportunity to illustrate the brand's ambition and ability to change production processes, product features, specs or delivery to make shopping more sustainable.

**Actions** are visible and strong commitments by the brand to bring their values or ethics to life - outside of the direct product or service. Again, this element of the framework represents a tangible outcome of a brand's commitment to certain values. Think of investing in sustainability credentials (e.g. B-Corp certification), supporting the local economy or purpose-driven start-ups, NGOs and charities. "Actions" should be the proof points of a Brand's ethics.

**Value** defines the financial benefit of a sustainable product element, features or process for shoppers - more important than ever in times of rising costs of living and inflation. Brands can think of energy-efficient products e.g. in home electronics to save both energy AND money, or durable products leading to longer life-cycles. This is an extremely powerful way to reposition a product in a more sustainable way and position this with a financial co-benefit.

**Ethics** reflect a company's own commitment to ethical business behaviour - its ethical DNA. This could include commitments to fair working conditions, diversity and inclusion or a fair-trade mentality. Across sectors, "Purposeful

Purchase Journeys (PPJ)" shows a strong influence of ethical behaviour on product choice. Consistently across categories, we found that GenZ or Young Millennials - generations below 35 years old - will pay more attention to this factor compared to, for example, Baby Boomers above 59 years old.



**PAVE** is not only a useful framework and guide for brands to think of the different benefits of sustainability - it could also serve as a checklist to make a brand's purpose simple, clear and measurable.

To measure the impact of brand purpose on product consideration, we integrated PAVE into our PPJ research. Let's take Beauty as an example - this framework allows brands to assign single elements of their purpose, as well as product characteristics, to the 4 different PAVE dimensions.

With this framework, it becomes possible to make a credible

# connection between a brand's purpose and their actual products and actions.



PAVE may also assist communications strategy around purpose while staying focused on key elements rather than risk getting lost in too many different areas.

# This framework can be applied across all specialisms within the marketing value chain,

and works for every category, as illustrated in the table below:

	Food	Home Electronics	Finance	Beauty	Sportswear
<u>Product</u>	Water-saving production methods	Reduces the carbon footprint / is carbon neutral	Invests in energy-efficient infrastructure or processes	Offers packaging made of recycled material	Products are made of (partly) recycled materials, innovative material
<u>Actions</u>	Invests in sustainability commitments	Supports the environment as a brand / invests in sustainability commitments	Offers sustainable investment funds	Invests in sustainability commitments	Supports the environment as a brand / invest in sustainability commitments
<u>Value</u>	Products better priced than alternatives, e.g. real meat	Energy-efficient products, durable products	Paperless processes	Produces products that are very economical in use	Durable products
<u>Ethics</u>	Brand is committed to supporting the environment, animal welfare, acts fair	Helps shoppers be better for the environment when using its products, acts fair	Shares shoppers' values & beliefs, invests in DEI	Does not test on animals, shares shopper values & beliefs	Acts fair, shares shopper values & beliefs

*Purpose is one element within an overall brand strategy that must be brought to life, becoming relevant and tangible for shoppers. Brands that leverage frameworks such as PAVE will be better positioned to turn their purpose into a real brand or product promise.*

*PAVE-aligned drivers can even be as important, credible and relevant for the brand's success as those classical, more established brand promises such as quality or design.*

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**More Purpose  
= More Sales**

# Brands that activate their purpose will not only drive brand perception,

they will also drive product consideration and ultimately, sales. Our PPJ research uses an implicit choice model to quantify the importance of purchase drivers, either PAVE-classified or established, non-sustainable ones. And just as sustainability influences brand perception, we can see that sustainability elements are becoming additional factors that influence shoppers' purchase decisions.

Using **PAVE**, we made this effect measurable and visible.



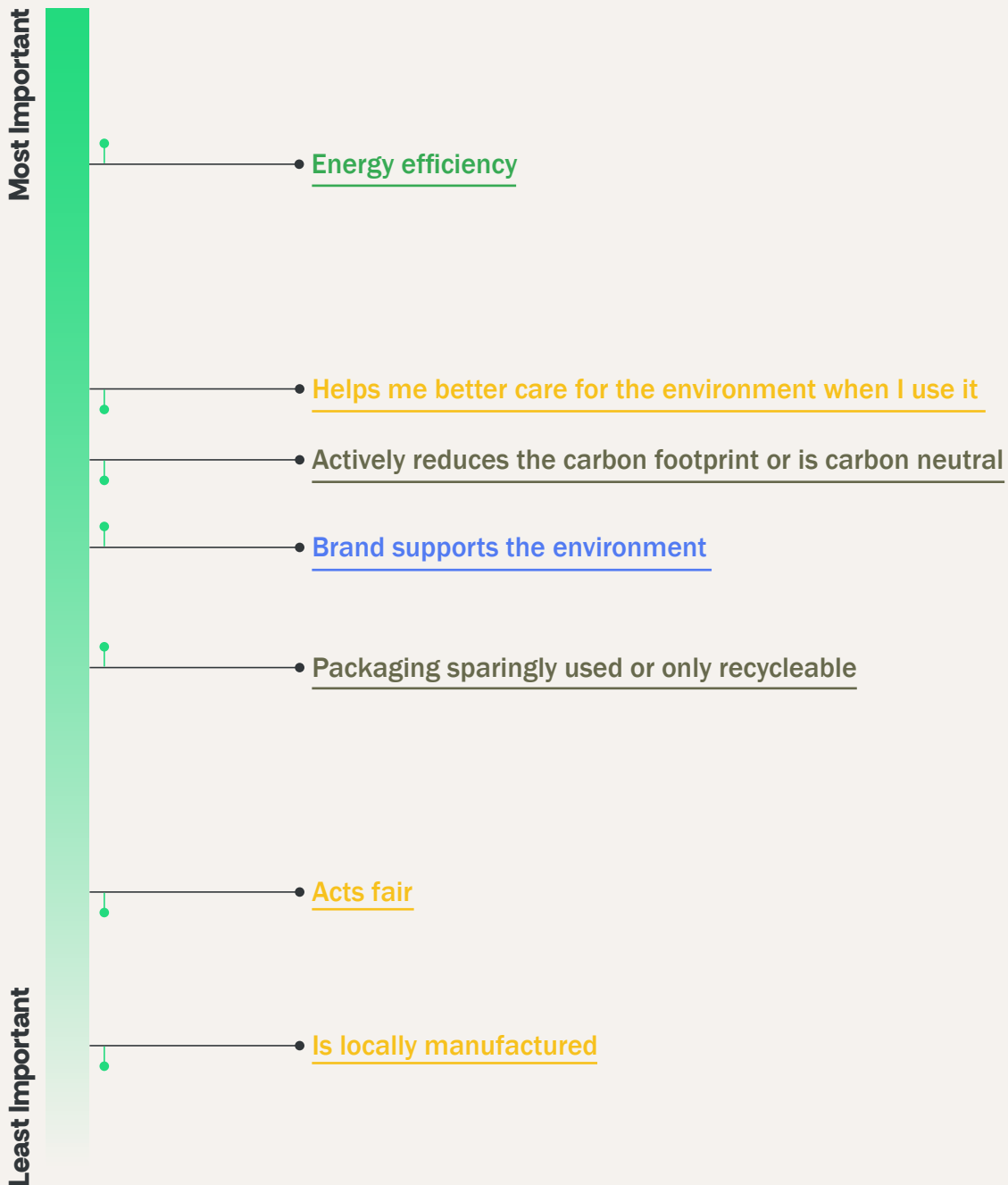
Let's take **Home Electronics** as an example. We incorporated 24 different purchase drivers in an implicit choice model to identify how much more - or less - important sustainability is compared to non-sustainable drivers. We coded the top 10 purchase drivers for Home Electronics in the UK according to their PAVE classification, whereas classical drivers are shown in light grey. This shows that, at a category level, Energy Efficiency - classified as Value - has the strongest impact.





# Focusing on sustainable purchase drivers only,

again PAVE-classified, it becomes obvious that ethical brand behaviour and sustainable product characteristics are also becoming influential on purchase consideration within the category.



What stood out from this research, however, was that

# value for money & quality

continue to have a stronger influence on purchase intent than Sustainability. This is undoubtedly a major challenge for many brands in times of economic uncertainty in many markets around the world, including the UK. This is a complex issue, but we found that sustainability communications can serve as an untapped opportunity to highlight the potential long-term cost benefits of a sustainable choice.

# 60%

of **Home Electronics** shoppers cite “Energy Efficiency” as one of the most important measures to offset rising costs of living.

Within **Finance**, the second most important purchase driver is whether a finance brand is a financially stable organisation, and

# 43%

43% of finance shoppers consider buying finance products from finance brands because of their social or environmental commitments or products.

This highlights an opportunity to showcase the top performing assets or funds within a company’s sustainable fund portfolio.

The **Meat-Free** category is often categorised as being cost-prohibitive or higher-cost than the traditional meat equivalent, which serves as a barrier to purchase or

consideration. However, the market has developed rapidly over the last few years, and in many instances the meat-free products have reached price-parity or may even be cheaper than their animal-based counterparts and with equal or better nutritional value per pound spent.

In our PPJ research, we found that “Value for Money” was the third most important purchase driver,

# 41%

of meat-free shoppers still considered a “high price” as one of the biggest barriers to the category, and yet only

# 15%

recognised that meat-free could be more affordable than meat.

**The Sustainable choice can already be the more economic choice - but UK citizens are not hearing that message from brands.**

Tesco Meatballs

# £9.38

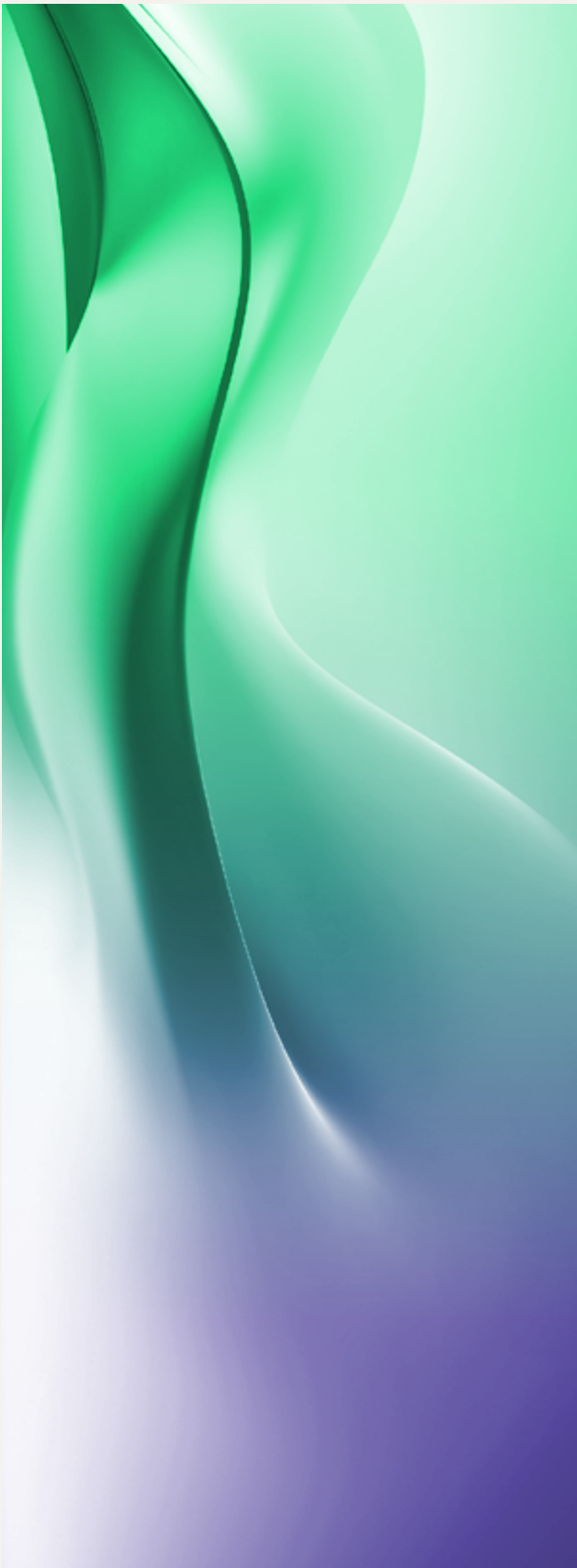
per kg

per kg

Tesco Meat-Free Balls

# £6.84

*Examples show that Meat-Free can already be kinder on planet, health, AND wallet than animal-meat products. The “green premium” no longer exists for a variety of comparable food products.*



This turns our **PAVE** Framework into such a powerful tool, as it makes the financial benefit of a product part of the sustainability agenda. In an ideal world, the “Greener” choice should also be the “Cheaper” choice for customers, and shoppers should not have to choose either

between Sustainability or Affordability. Making the connection between (economic) Value and Ethics ensures that shoppers have the chance to recognize the mid- to longer-term financial benefit of a greener choice.

High ESG standards, however, come at an organisational financial cost, and in many cases brands will not be able to offer the co-benefit of saving money for the greener choice for the time being. We therefore recommend highlighting additionally the importance of “Ethics” and “Value” to shoppers to help buyers to better weigh up price vs. carbon footprint. For example, some brands like Oatly (animal-free products) or Allbirds (fashion/retail) provide an additional “currency” by communicating each product’s carbon footprint alongside more traditional proof points. We expect this transparency to customers to be increasingly important over coming years, as the financial benefits of these proof-points to brands become ever clearer. The more brands integrate this currency into their packaging or website, and the more regulation dictates this requirement with standardisation of labels, shoppers will become more familiar with this concept and start to weigh more easily the benefits of “Ethics” versus “Value”. In an ideal future, sustainable shopping might actually feel seamless, effortless and natural.

**Consider sustainability as a driver for sales, and where possible, highlight the short and long term financial benefits of a sustainable purchase. It is not just the Brand’s responsibility, but it is actually in the Brand’s own interest to be more involved in customers’ purchase decision-making process by providing more proof points. In time, customers will be able to identify the long-term benefits of a greener choice and further increase purchase intent.**



**The generational  
“dilemma”**  
- purposeful growth  
across generations

We see a fundamental shift in values among younger generations with a direct effect on purchasing decisions, with Young Millennials or Gen Z buyers driven more by values and sustainability than Baby Boomers, and this shift is consistent in all categories. In reality, the perception of a sustainable brand is changing. Baby Boomers may pay particular attention to tangible product features and specs such

as recyclable packaging and materials, or energy-efficient manufacturing processes while younger generations tend to think more holistically: fair working conditions, adherence to DEI protocols or social responsibility are values that weigh stronger in their purchasing decisions.

*In our research, we defined the different generational audiences as follows:*

## Gen Z

18-24



25-34

## Young Millennials



35-44

## Older Millennials



## Gen X

45-58



59+

## Baby Boomers

In the example of **Finance**:

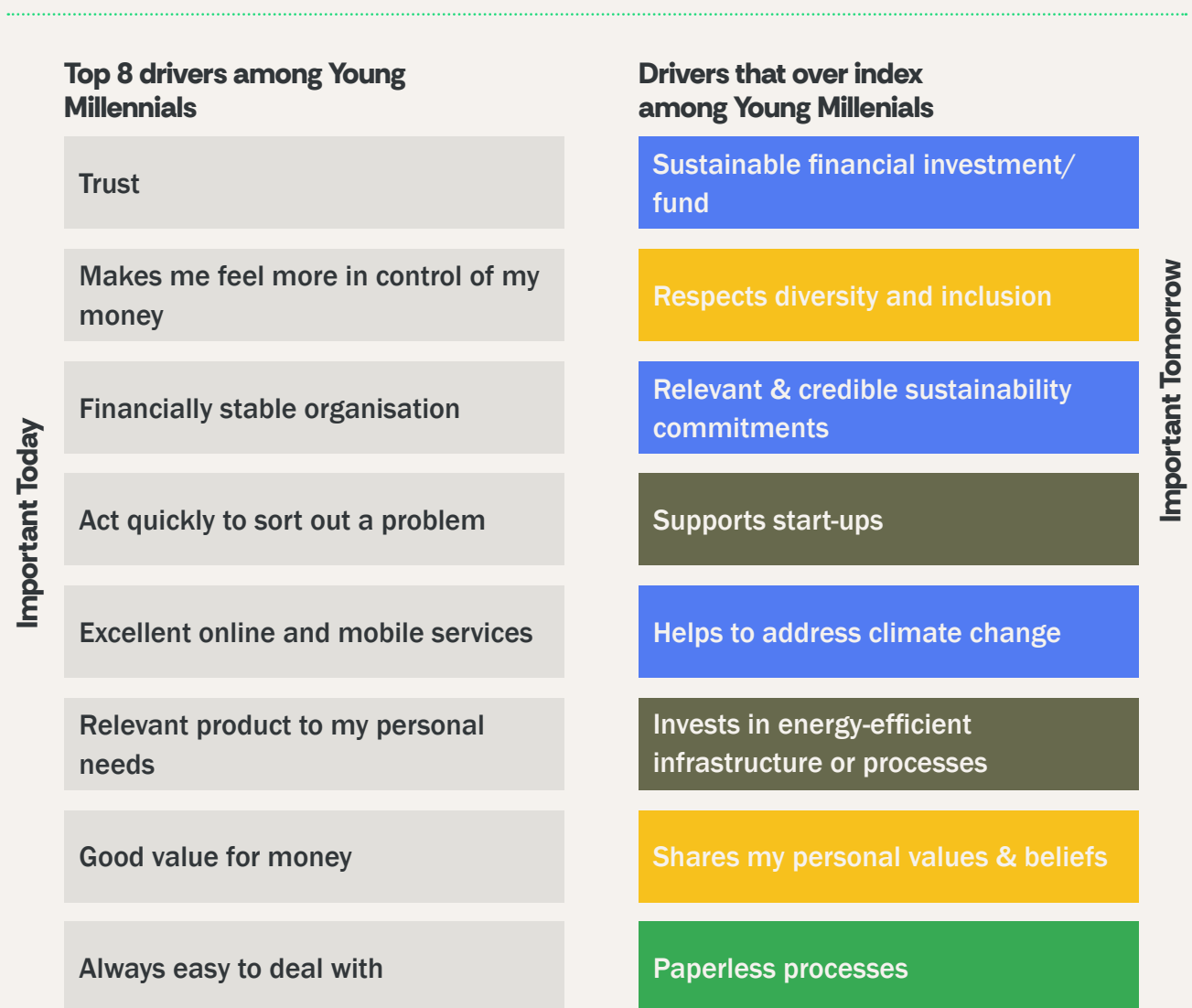
Younger buyers do not lose sight of the

# established purchase drivers

however the strength of the influence of those established drivers is shifting. “Trust”,

conveying a “feeling of being in control of one’s own finances” and being a “financially stable organisation” are the top drivers for shopping decisions in the finance sector for Young Millennial buyers.

All of these are established purchase drivers. However, their relative weight is lower and in response, sustainability drivers are more influential in their purchase journey.



Shown are the top purchase drivers for Young Millennial finance shoppers (left) and those nascent purchase drivers with a higher relevance in this age cohort, compared to all category buyers.

This again emphasises the importance of having a comprehensive and holistic approach to activate buyers across generations.

Taking **Sportswear** as another example:

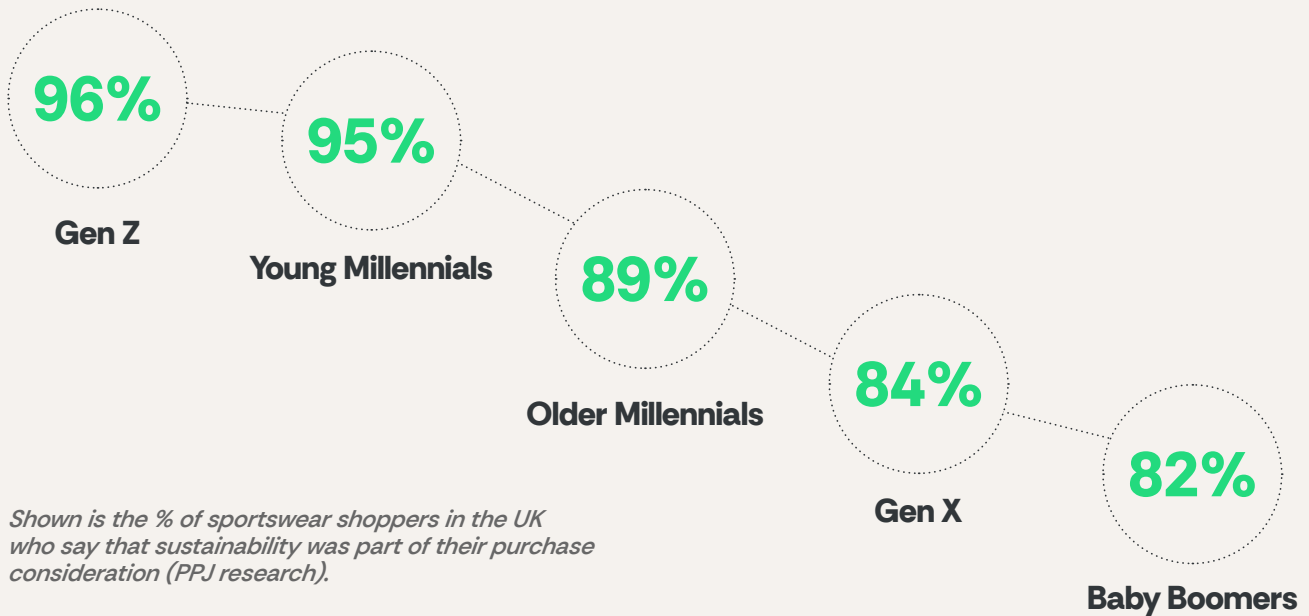
Sustainability already plays a role for

**89%**

of all UK sportswear shoppers. However,

when broken down by generations, the data shows that sustainability is becoming more influential among younger buyers.

This suggests that future shopping decisions will be made increasingly based upon sustainable drivers, as Young Millennials, GenZ and further generations grow in purchasing power.



The statistics are clear:

Only

**4%**

of Gen Z sportswear shoppers don't think at all about sustainability when making their choice - and sustainability made up a share of

**32%**

of their purchase decision.

We wanted to stress-test these results, and asked sportswear shoppers about their last purchase.

At a total level,

**26%**

of sportswear buyers said that they intentionally bought the most sustainable option. Looking generationally, this number increases to

**46%** of Young Millennials,

**VS**

**28%**

of Baby Boomer buyers.

Additionally, even if sustainability was not the final decision criterion, the table below shows that younger shoppers especially pay attention to sustainability when making their choice, and even among GenX or Baby

Boomers, the group of shoppers picking at least one out of a set of sustainable options represents a massive revenue opportunity for brands.

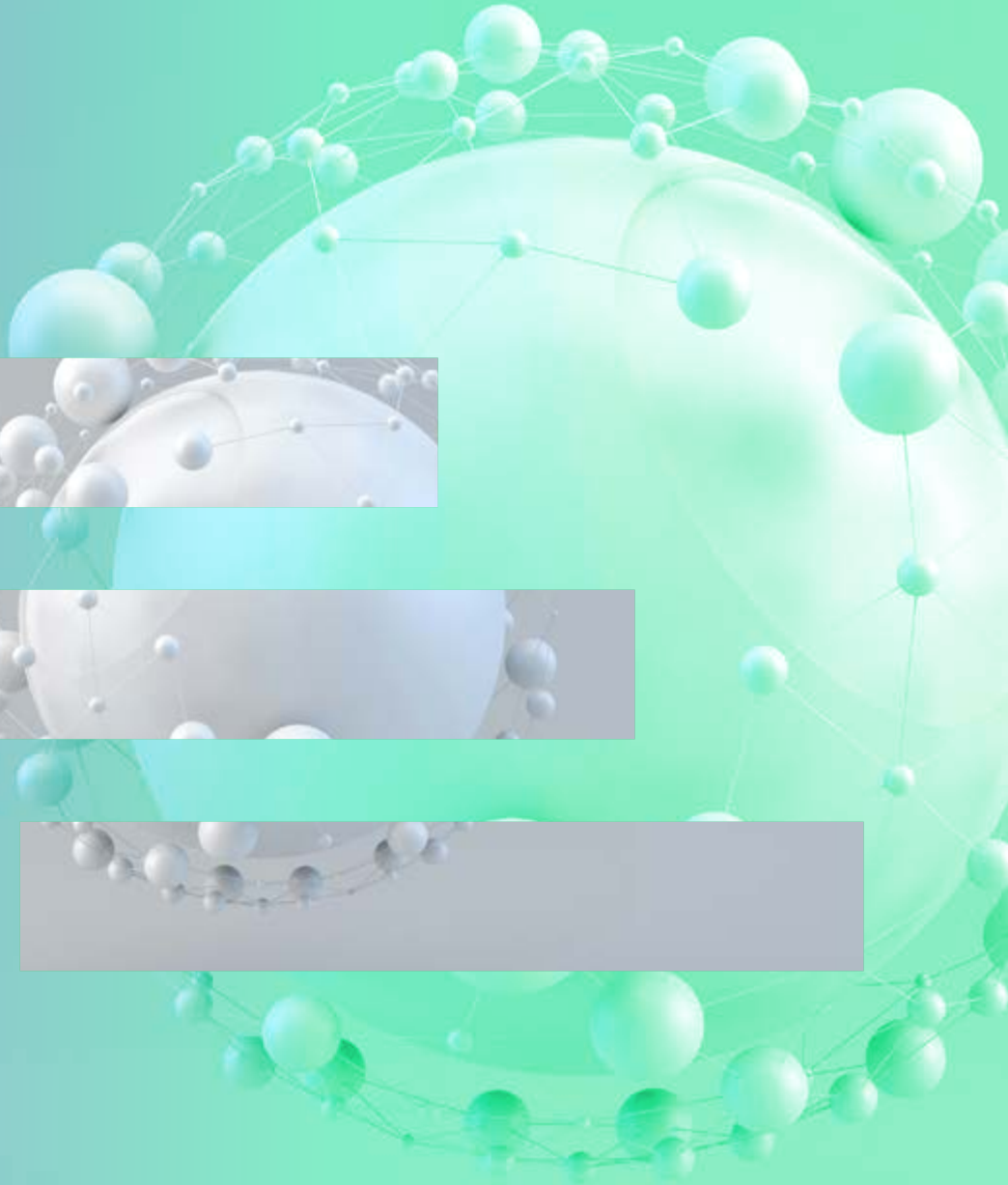
	Gen Z	Young Millennials	Older Millennials	Gen X	Baby Boomers
<b>Intentionally purchased the most suitable option</b>	32%	46%	29%	15%	9%
<b>The most sustainable options was by chance also the preferred one</b>	33%	20%	25%	29%	15%
<b>Did not buy the most sustainable option, but one out of a few sustainable options</b>	18%	14%	13%	15%	21%
<b>I wanted to buy a more sustainable option but ended buying a less sustainable one</b>	9%	5%	7%	10%	9%
<b>Sustainability was not a top driver in the purchase decision</b>	9%	15%	26%	42%	46%

*Level of sustainability of the last Sportswear purchase made in the UK, by audience group.*

This will affect media planning, as we will explore further in Chapter 6, and although we are not advocating for the complete adoption of campaign targeting based only on demographics, we maintain that there is still value here. Demographics aren't dead. What we suggest, instead, is to activate

the brand purpose holistically to increase impact across all generations, testing creative variations for different age cohorts and plan media activations in a way that yields exposure and impacts across generations.





**Walk the Walk &  
Talk the Talk**

Citizens increasingly expect brands to take a stance on issues that plague our society, and to have a purpose beyond the simple pursuit of profit. Many businesses communicate this “Brand Purpose” in their Mission Statement. We define Mission Statement as a brand’s ability to summarise its purpose succinctly; their elevator pitch. Across owned touchpoints such as a brand’s website, many businesses have started to make this more customer-facing. However, we wanted to validate whether this effort - creating and communicating Mission Statements - translates into higher brand differentiation or sales.

In short, it does.

**71%**

of category buyers say that a brand’s mission statement sets it apart from competitors, and

**69%**

of shoppers feel encouraged to buy from a brand - if they are aware of it.

The Beauty and Sportswear category stand out whereas results across the other



categories are fairly consistent.

However, in most categories **fewer than 2 out of 10 shoppers could correctly assign a mission statement to the right brand.** In the Beauty category, only **1 out of 4 shoppers could correctly assign it.** **This low number in most categories indicates a large opportunity for brands to live into and promote their Mission Statement.**

	Meat-free product	Home electronics	Finance	Beauty	Sportswear
<b>Mission statement correctly assigned to the right brand</b>	13%	46%	15%	25%	15%

*Shown is the % of buyers who are able to assign a mission statement to the correct brand after exposure.*

Our PPJ research clearly shows that the investment made in increasing this number will have a positive ROI on brand perception and sales. Across categories shoppers say that the mission statement of a brand sets it positively apart from others, and encourages them to buy this brand. This shows the strong activation potential of a brand's mission statement.

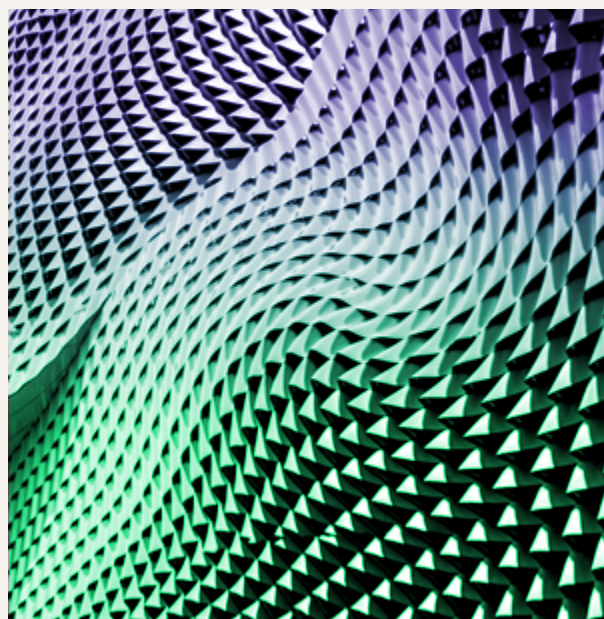
Notably, this positive effect is strongest among those shoppers who were able to correctly assign those mission statements to the right brand, once they had been told the mission statement itself. Results are weaker among those who do not make the mental connection of a brand and its mission statement. As far as this aspect is concerned, we believe that most brands still have work to do.

	Meat-free product	Home electronics	Finance	Beauty	Sportswear
Set the brand positively apart from other brands	68%	69%	64%	77%	79%
Encourage me to buy the brand	69%	67%	51%	80%	77%

*Shown is the % of buyers correctly assigning the mission statement, who say that - after having been exposed to it - the mission statement of a brand sets the brand positively apart from others and would encourage them to buy products from this brand.*

But why are so few shoppers able to make the mental connection between the brand they bought and its mission statement? We identified two strong influencing factors.

The first factor is **lack of clarity**: most Mission Statements featured on a brand's website are bold, short and - often quite unclear. Many brands seem to avoid clarity (e.g. not providing detailed plans and actions) likely to avoid being accused of greenwashing, or simply because the Marketing department might not be fully aware of the nuanced production processes or what the company can communicate credibly. Those abstract mission statements may feel generic and may lack relevance simply because people cannot clearly understand how the brand will make it real.



Brands should recognise this as a clear area for improvement as **shoppers seek authenticity and credibility rather than bold but generic plans.**

We found that more than **1 in 3 shoppers, across all categories**, check at least sometimes if a brand's mission statement is credible or reliable.

Audience	Meat-free	Home electronics	Finance	Beauty	Sportswear
All ages	36%	37%	30%	37%	33%
Encourage me to buy the brand	69%	67%	51%	80%	77%

*Shown is the % of buyers who check at least sometimes if a brand's mission statement is credible or reliable, by category.*

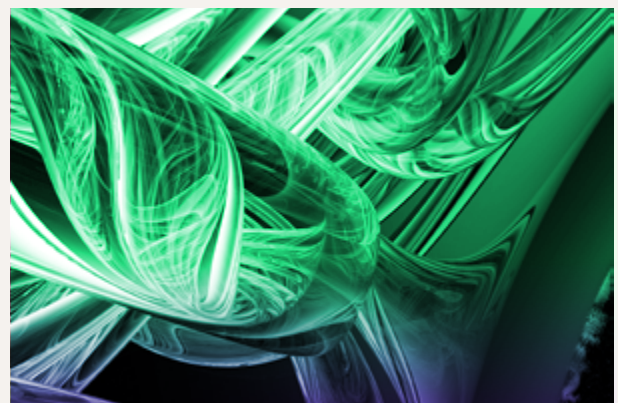
This becomes even more relevant for younger shoppers:

Audience	Meat-free	Home electronics	Finance	Beauty	Sportswear
Gen Z	52%	46%	33%	45%	34%
Young Millennials	45%	40%	38%	43%	35%

*Shown is the % of buyers who check at least sometimes if a brand's mission statement is credible or reliable, by generation & category.*

We recommend testing several versions of a mission statement to ensure that the one that ends up on a brand's website and in marketing communications will be the most impactful, with the strongest effect on brand perception and purchase intent.

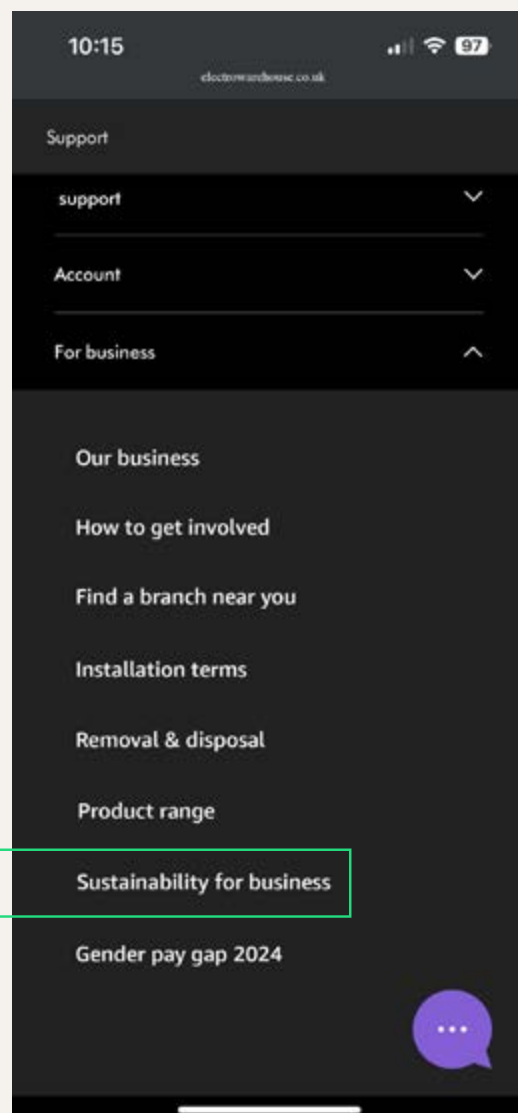
The second factor is **poor "findability"**: it took surprisingly long to find the mission statements in many cases during our research. Long scrolling, with content around a brand's purpose hidden below the fold or deep into menus or submenus



mean that potential customers have to put in lots of time and effort to find the brand's mission statement.

Below is an example of what poor findability looks like to showcase what customers often experience when trying to look for a brand's mission statement:

### Landing Page

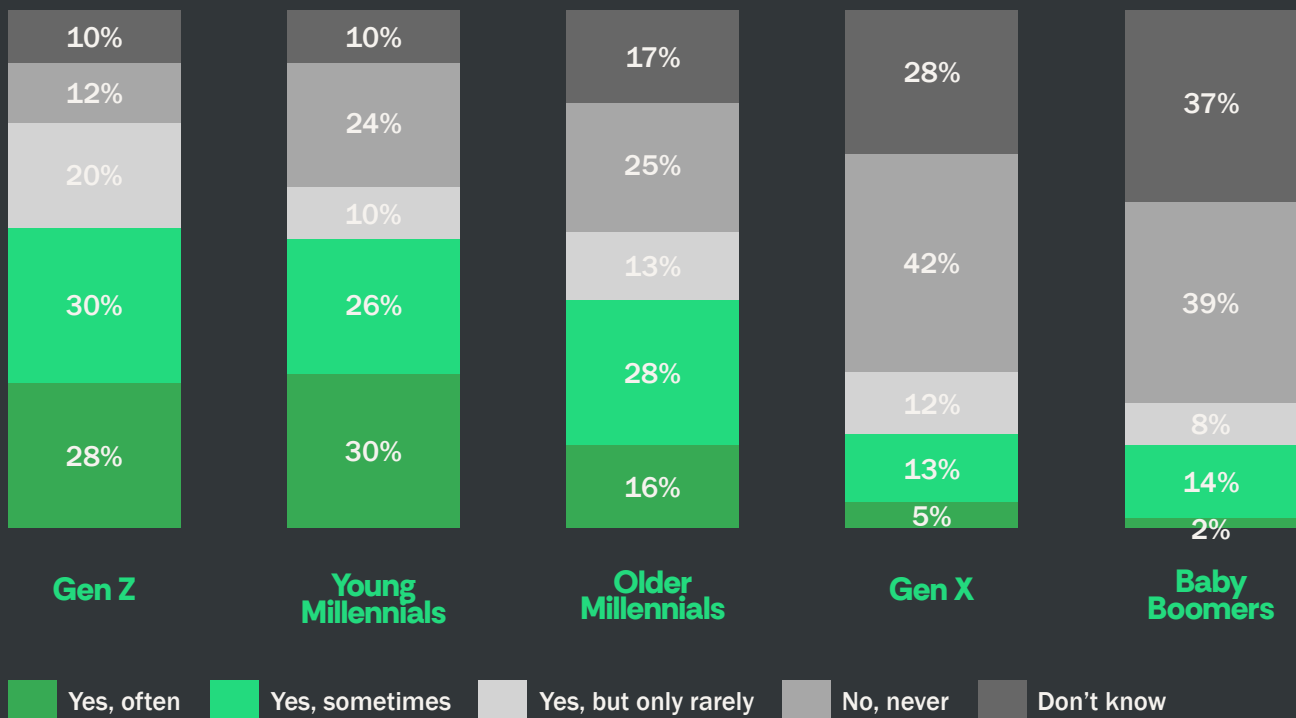


### Bottom of the Landing Page

When entering the landing page, shoppers need to proactively scroll through all available menu items before finally arriving on the sustainability sub-page. A significant portion of buyers want to properly engage with a brand's purpose, but a lack of findability is making this task overly burdensome.

As a brand, this is an opportunity to deal with future obstacles as well. **Almost 6 in 10 Gen Z shoppers say that they come across false or misleading information by**

**brands in the category.** Additionally, we found that the older the shopper, the less attention is paid to this topic.



Shown is the % of buyers saying that they have already seen or heard misleading information from brands, by generation

Shoppers across generations seem to have a solid, and fairly consistent, understanding of what signals from brands they perceive as “greenwashing”.

A top indicator for greenwashing is to use false or misleading keywords on the product package or in advertising. For example, when the brand describes a product as “fair” or “sustainable” without proof such as a certification scheme logo or score.

We also recommend using the terms “eco-friendly”, “net-zero” or “climate neutral” with precaution, especially when claims are achieved through the use of carbon offsetting schemes, and not through real

changes or efforts made by the brand to reduce carbon emissions from its supply chain. It is worth noting that **upcoming EU legislation** will actually ban many of these terms within advertising.

Young shoppers are also more bought into the concept of circularity, and are much more sensitive towards brand behaviour in this field, such as destroying returned clothes / (= sending returned items to landfill), or inconsistent behaviour such as offering circular-economy style recycle / return schemes while simultaneously encouraging customers to buy more and more new items during accelerated sales cycles.

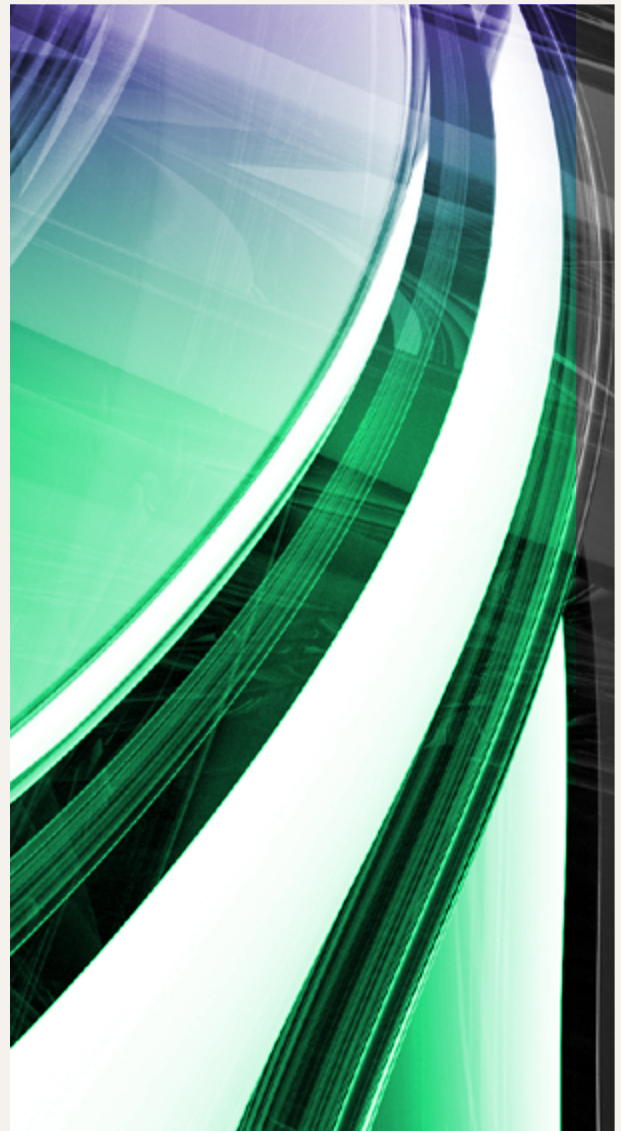
	All Sportswear Shoppers	Gen Z	Young Millennials	Older Millennials	Gen X	Baby Boomers
Use of keywords on product pack (e.g. fair, sustainable, ....) without a proof	59%	58%	52%	58%	64%	64%
Calling out recycled packaging, without effort to reduce packaging	56%	50%	51%	57%	59%	63%
Calling net-zero / climate neutral while only relying on CO2 certificates	53%	53%	56%	49%	54%	54%
Strong communication on sustainability but launch of (non-sustainable) annual collections	52%	38%	54%	52%	54%	55%
Calling out organic material when it is only a very small part of the product	50%	51%	49%	46%	52%	52%
Brands that advertise sustainability and have no concept for a circular economy	48%	49%	47%	47%	51%	47%
Brands destroying returned clothes / (= sending returned items to landfill)	43%	51%	46%	45%	38%	36%
Getting a voucher from a brand for buying new clothes when returning old clothes for recycling	40%	46%	48%	43%	34%	30%

*Shown is the % of buyers saying that these brand behaviours are relevant indicators for greenwashing, with largest response highlighted, by generation*

The common theme we identified is inconsistency. Unsubstantiated claims, inconsistent behaviour or over-exaggerating small actions actively work against a brand's sustainability perception.

Using a clear framework such as **PAVE** can turn a brand's purpose into concrete actions and establishes the guardrails by which brands can both evangelise their purpose and also significantly reduce the

**A mission statement is an opportunity to turn purpose into action,**



and thus bring it from a rather unclear, generic level to an actionable plan. Combined with a framework, such as PAVE, brands can authentically show actions that ladder up to their purpose, while reducing negative greenwashing accusations.

However, this will only work if shoppers can easily find a brand's mission statement. Investing in findability and exposure, is a significant step by which brands can turn their purpose into purposeful growth. From a planning perspective, this means taking a holistic approach across all media touchpoints, with the right mix of "push" and "pull" mechanisms and content.





## **Media Planning: Integrating Sustainability across Touchpoints**

It is clear, then, that in order to properly communicate a brand's sustainability credentials, the right message is crucial. However, how, where, and when to promote that message is the next important decision.

Media planning centres around the reach and relevance of a particular touchpoint to a particular audience. Therefore, as a first step, brands need to identify the touchpoints where current and future customers are most likely to research an upcoming purchase. But at which media touchpoint will a brand's sustainability agenda and message best be heard or seen?

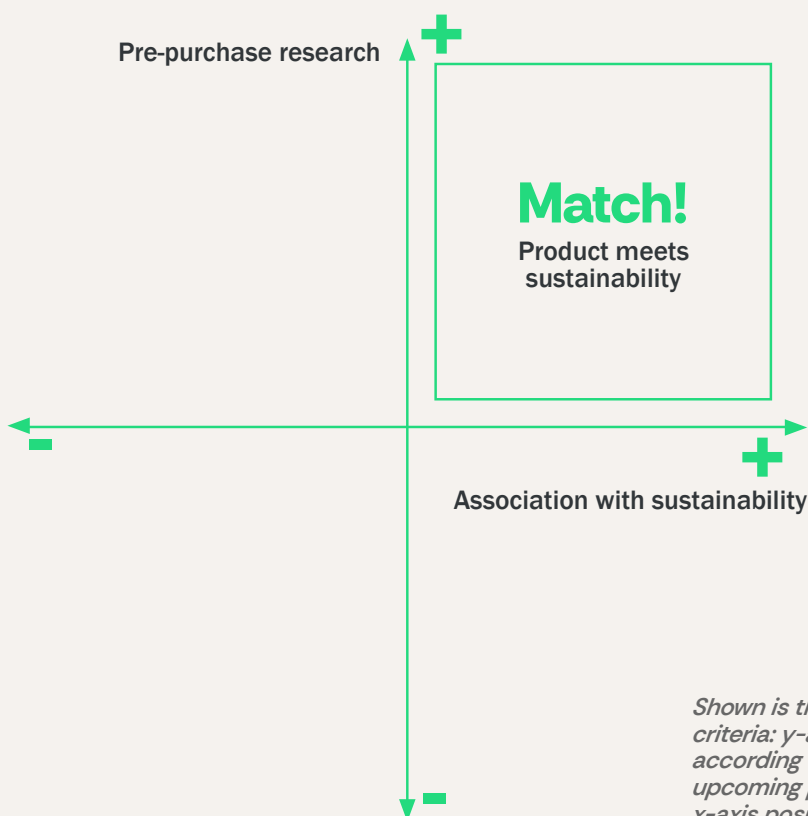
To improve planning efforts and media recommendations, we now consider a "sustainability match" criteria: the extent to which shoppers expect to find information on sustainability across different media touchpoints. Campaigns that take this additional criteria into consideration will be

more impactful, with a greater marketing ROI for their sustainability communications.

Plotting different media channels into a matrix that combines the two criteria: "pre-purchase research" and "sustainability associations" can enable the prioritisation of media channels for campaigns or branded content. Per category, we can determine whether a touchpoint is seen as a relevant asset to find product information (**product-led**) or if this touchpoint also provides a relevant and credible sustainability environment (**sustainability-led**).

A touchpoint that is product-led would be best positioned to promote features and specs, whereas a sustainability-led touchpoint could be the appropriate platform for brands to contextualise their products with a holistic and sustainable brand experience.

The planning map and the examples on the next page showcase how it works in



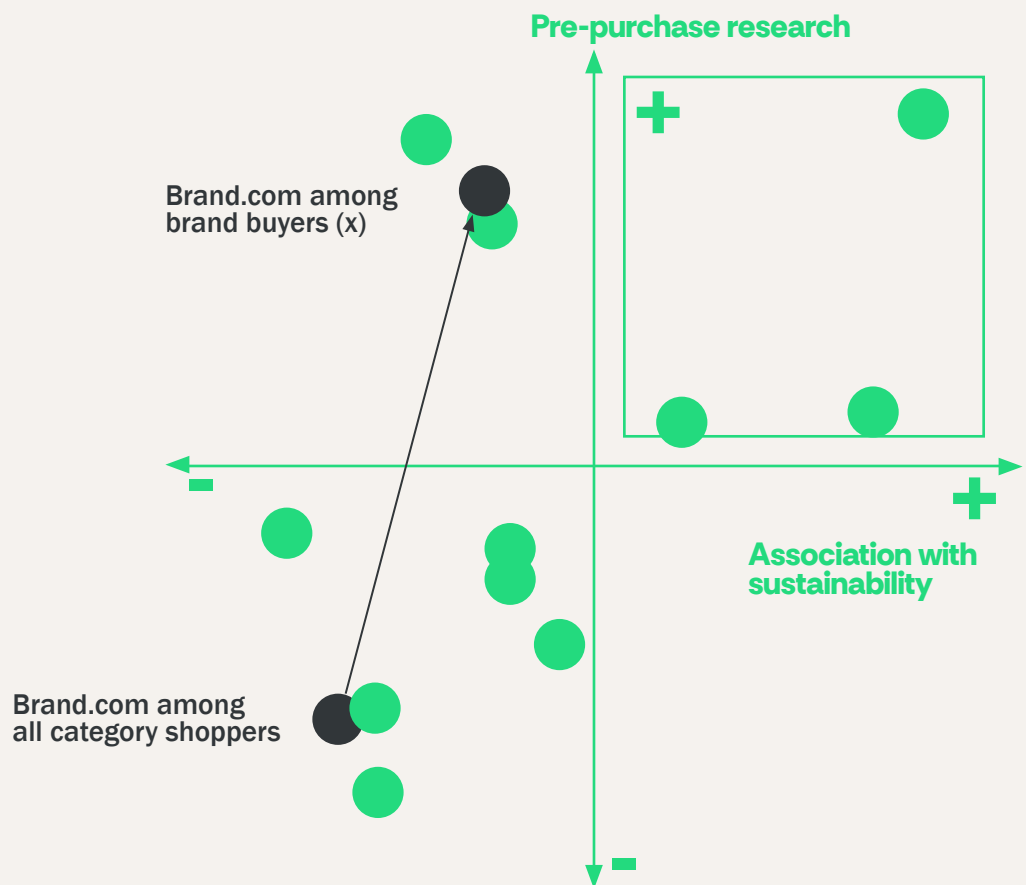
*Shown is the basic map of the sustainability-match criteria: y-axis locates touchpoints within a category according to its relevance for shoppers to inform upcoming purchase (pre-purchase research) and x-axis positions the same touchpoints*

Let's start with brand.com to illustrate how it works in practice, and use **Home Electronics** as an example.

Brand.com owns a hybrid-position in this case: located on the left-hand side of our matrix, it can be seen as a product-led touchpoint and relevant asset to drive sales. Accordingly, when shoppers access brand.com, they typically see a well-curated website, focused on the product portfolio, purchase process, price and delivery conditions. And typically: little to no sustainability information.

However, we also see that brand.com tends to change its position for individual brands. Looking at sustainability-advanced

brands - those that are already perceived as a sustainable brand above the category average - brand.com has a role to drive both, informing upcoming purchases while also educating on the brand's purpose.



*Shown is the position of brand.com (for one selected brand in the category) among all category buyers vs. among buyers of the same brand in Home Electronics*

Brand.com is therefore a crucial vehicle for promoting a brand's product AND communicating its purpose - driving purchase intent through a credible media channel to promote its sustainability credentials.

A media recommendation for this brand would be to reposition brand.com to drive sales through clear and relevant product descriptions, features and specs **and also** feature sustainability information more prominently, maximising the impact of this particular purchase driver. The core of a media strategy in this case is to drive traffic to brand.com through enhanced Search Engine Optimisation / Marketing (SEO / SEM) tactics and to drive engagement on brand.com through a more holistic on-page content strategy.

Search engines, primarily Google, also play an important role. Consistently across all categories, we found that search is highly relevant for shoppers when conducting pre-purchase research, and also when learning about sustainability, making it a

strong product-led and sustainability-led touchpoint.

We found in our PPJ research that

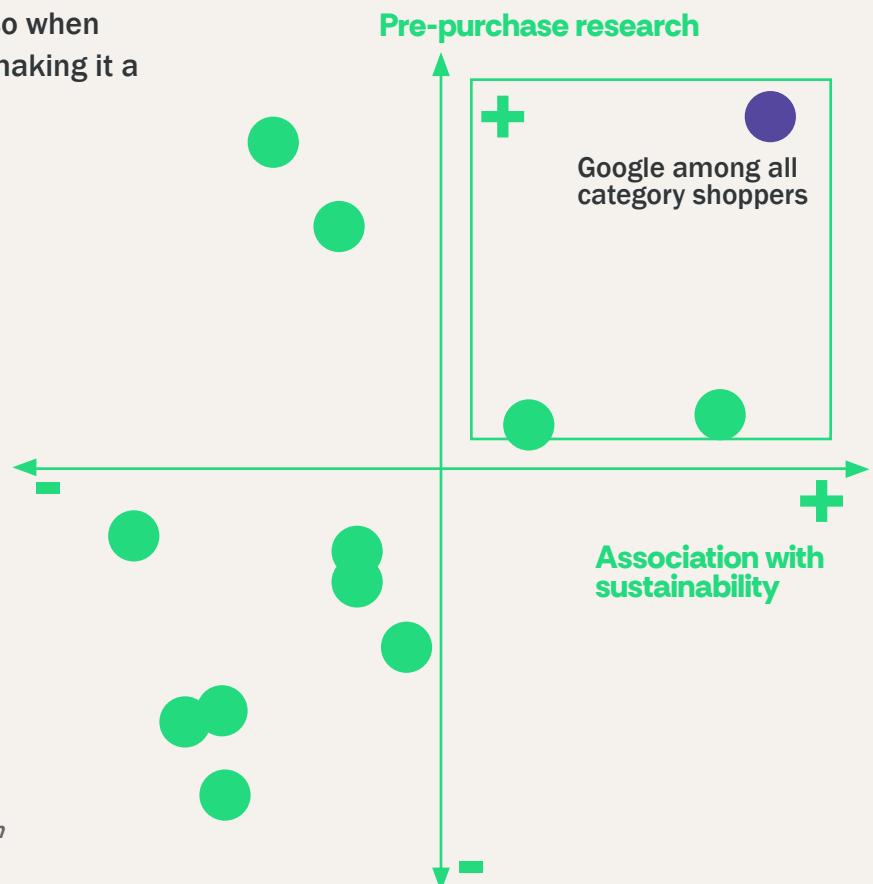
# 62%

of UK shoppers across all categories go online at least once per month to learn about sustainability - this could be to learn about climate change, the carbon footprints of products or brands, DEI, or to learn about a brand's sustainability strategy.

This number increases to almost

# 90%

among GenZ shoppers. Unsurprisingly, one of the top media channels where they expect to find information around those themes is through Google Search.



*Shown is the position of Google search among category buyers in Home Electronics.*

Considering this, paid and / or organic search should be at the heart of any media strategy that aims at leveraging a brand's purpose to drive sales and brand perception. Our PPJ research investigates the net-effect of a touchpoint across all interactions, and does not differentiate between organic or paid search. Brands and planners will together identify the most efficient and effective way to leverage paid and organic search in combination.

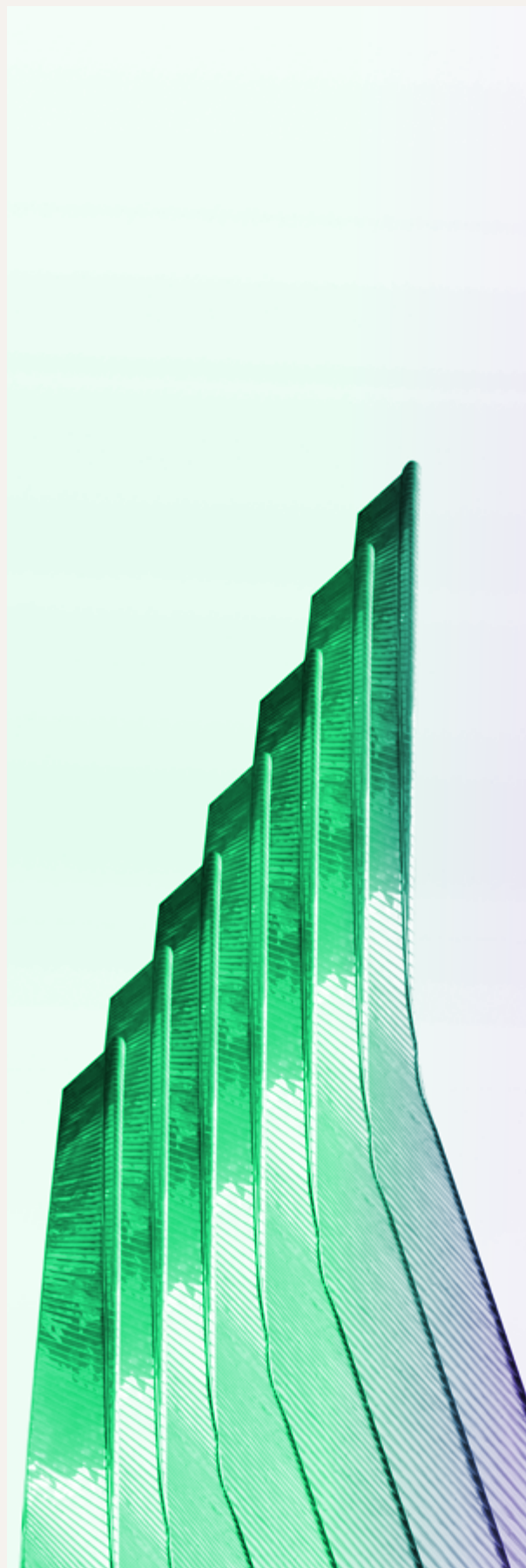
To lay the foundation for an effective search strategy we stepped into the shopper's shoes and googled different brands in different categories - with a surprising insight: brands barely promote their - sometimes amazing - sustainability content on Google.

For Marketers, then, we should understand how shoppers are coming to brand.com, and how and when sustainability topics are related to those journeys. We looked at the following queries/journeys:

- "Branded search" - googled the brand name
- "Contextual branded search" - googled the brand name and sustainability in one query
- "Contextual generic search" - googled for sustainable products in the category

After a "Branded search" on Google we typically see a well-curated product-focused landing page without any link to the brand's purpose or sustainability agenda. A "Contextual branded search" often leads to discovering great content brands already have - it is there but it is not well-promoted. A "Contextual generic search" often shows nothing at all. In most cases, no brands were found featured on the Google results page. This presents a huge opportunity for brands to find white space for their

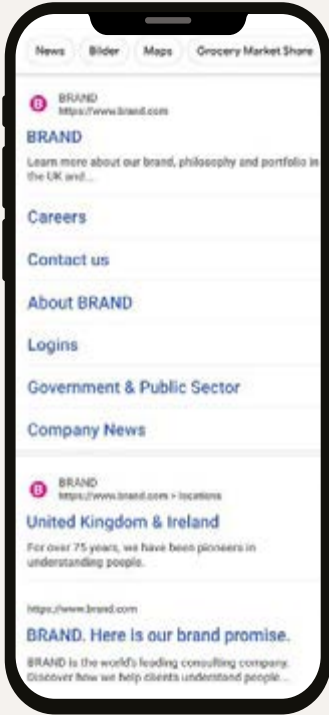
search campaigns, and amplify their search marketing strategy towards a higher share of sustainable generic keywords.



# Branded Search

Searches for your brand e.g. on Google or YouTube

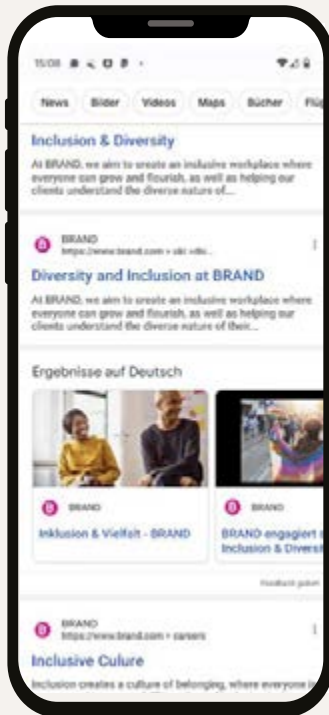
Electro Warehouse



# Contextual Branded Search

Deliberately searches for your brand e.g. on Google or YouTube AND your sustainability / DEI POV

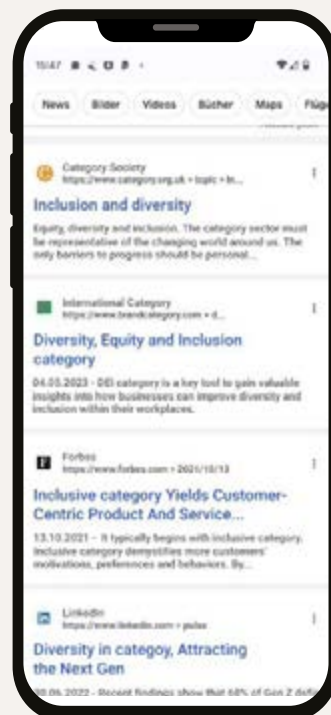
Electro Warehouse Sustainability



# Contextual Generic Search

deliberately searches for sustainability / DEI content in your category

Electro Warehouse DEI



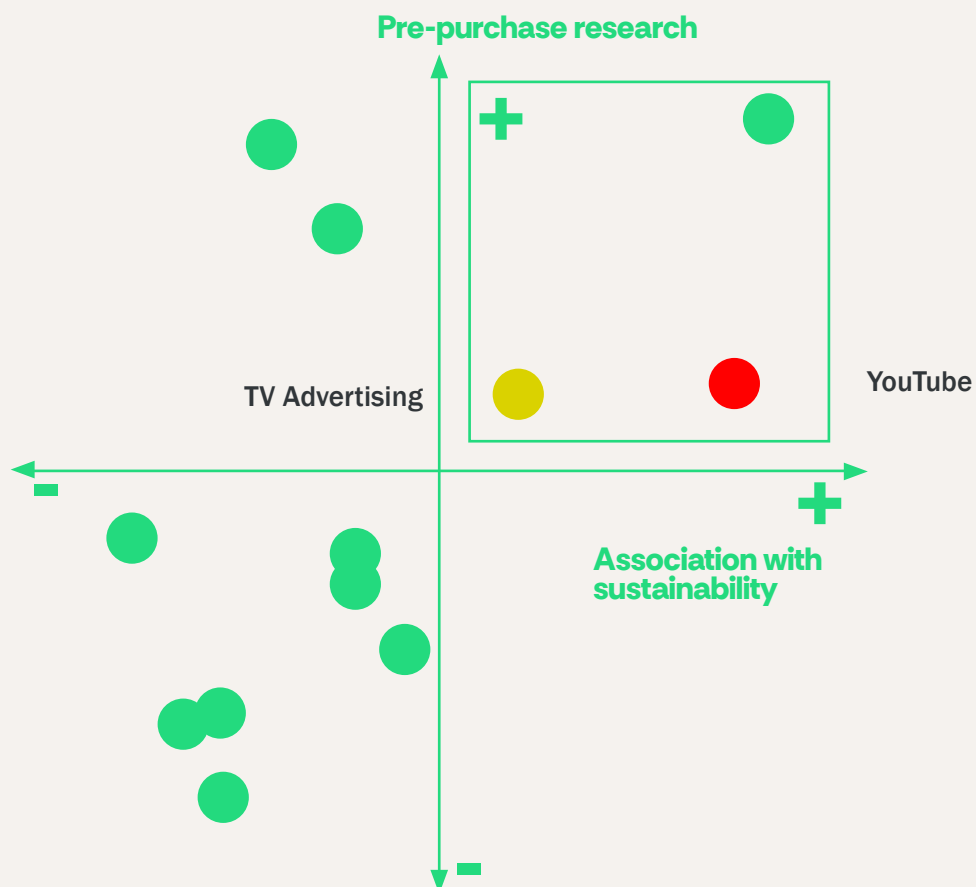
Our media recommendation in this case is to identify and prioritise existing sustainability content, and to optimise generic SEM and SEO to best position the brand on search pages (Google and beyond), both on paid and organic results.

# Let's consider the example of some more media touchpoints.

TV advertising and Online Video both fall broadly into the same quadrant of our map, with online video albeit typically more sustainability-led compared to TV.

However, this map indicates that both media channels are a) relevant to inform purchase and b) channels where customers expect to find content on sustainability and therefore are likely more receptive to a brand's message.

This data suggests that well-aligned TV and Online Video campaigns will benefit from high synergy effects with a positive knock-on effect on media effectiveness. Another strong opportunity for brands is to nurture their own channels on social media or video platforms, to become creators and an active driver of change in the industry beyond advertising.



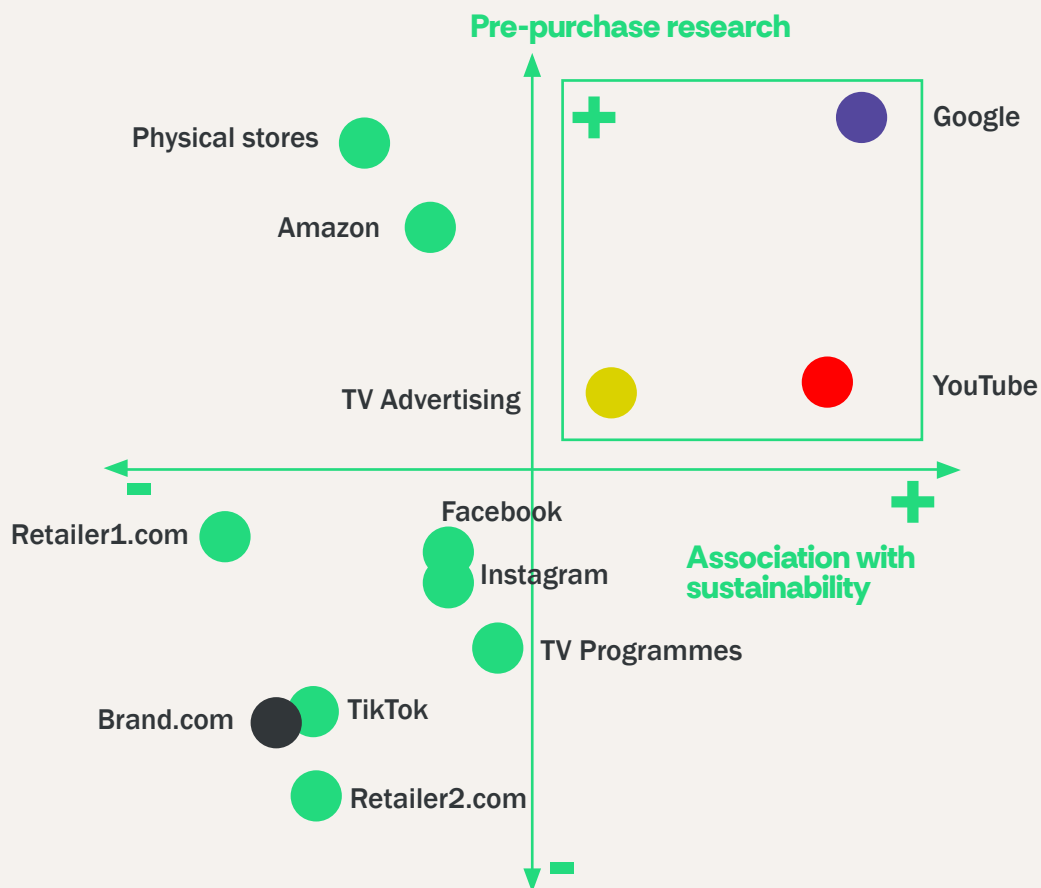
*Shown is the position of TV and Online Video among category buyers in Home Electronics.*

These examples show how much a foundational understanding of how people engage with products and sustainability can increase efficiency and effectiveness of campaigns, if taken into consideration in the media or customer journey planning process.

Our “Purposeful Purchase Journeys” research allows us to plot many more different touchpoints in a map such as social media platforms, retailers or physical stores. The touchpoint model included in

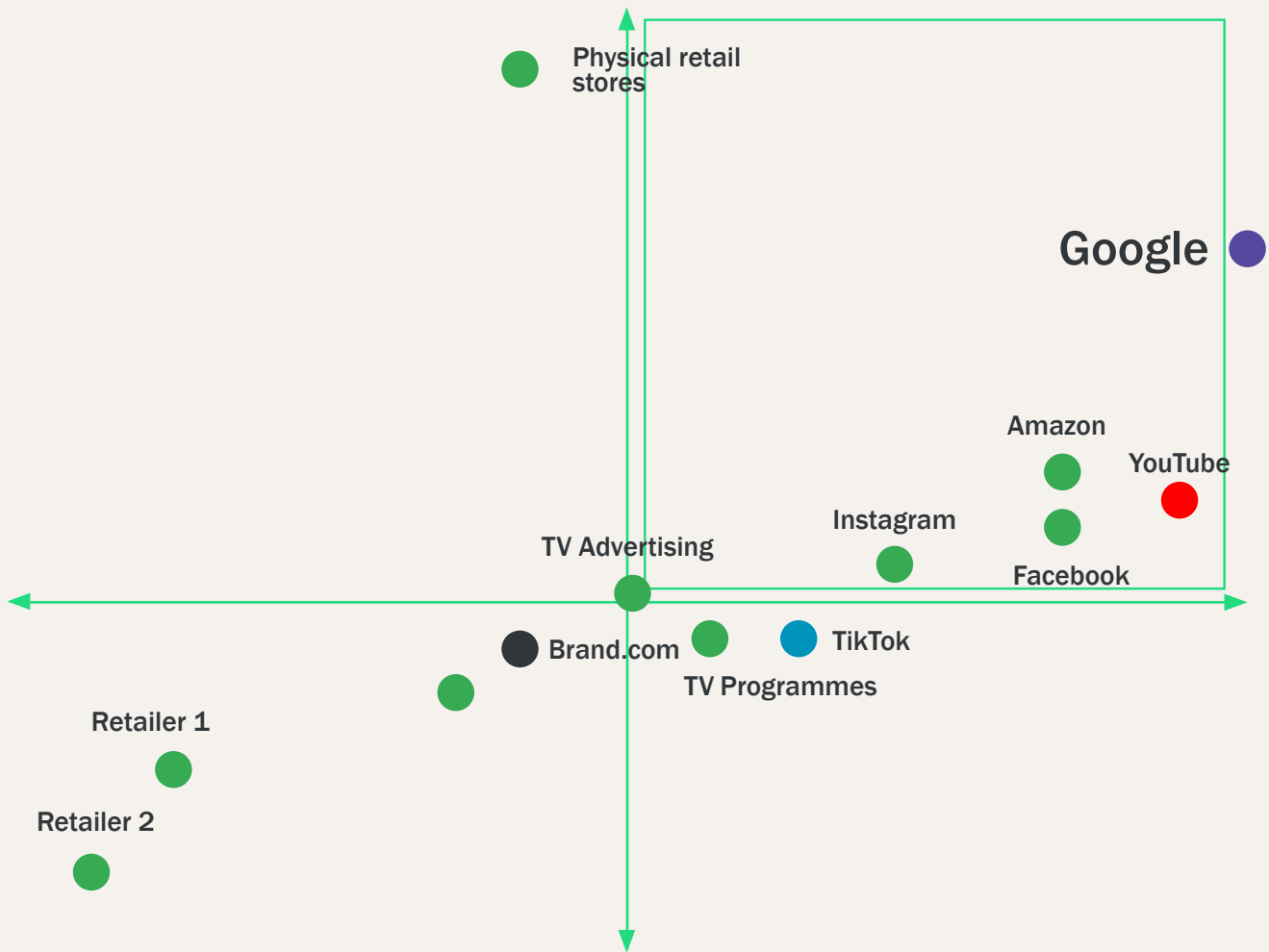
this research has been validated by Kantar over the years in many different markets and categories. We found this to be a validated, actionable and insightful way to increase the impact of any marketing effort.

Below are two complete examples of these Sustainability Planning Maps from different categories (**Home Electronics, and Sportswear**) - highlighting the nuances between categories.



*Shown is the position of selected touchpoints among category buyers in home electronics.*





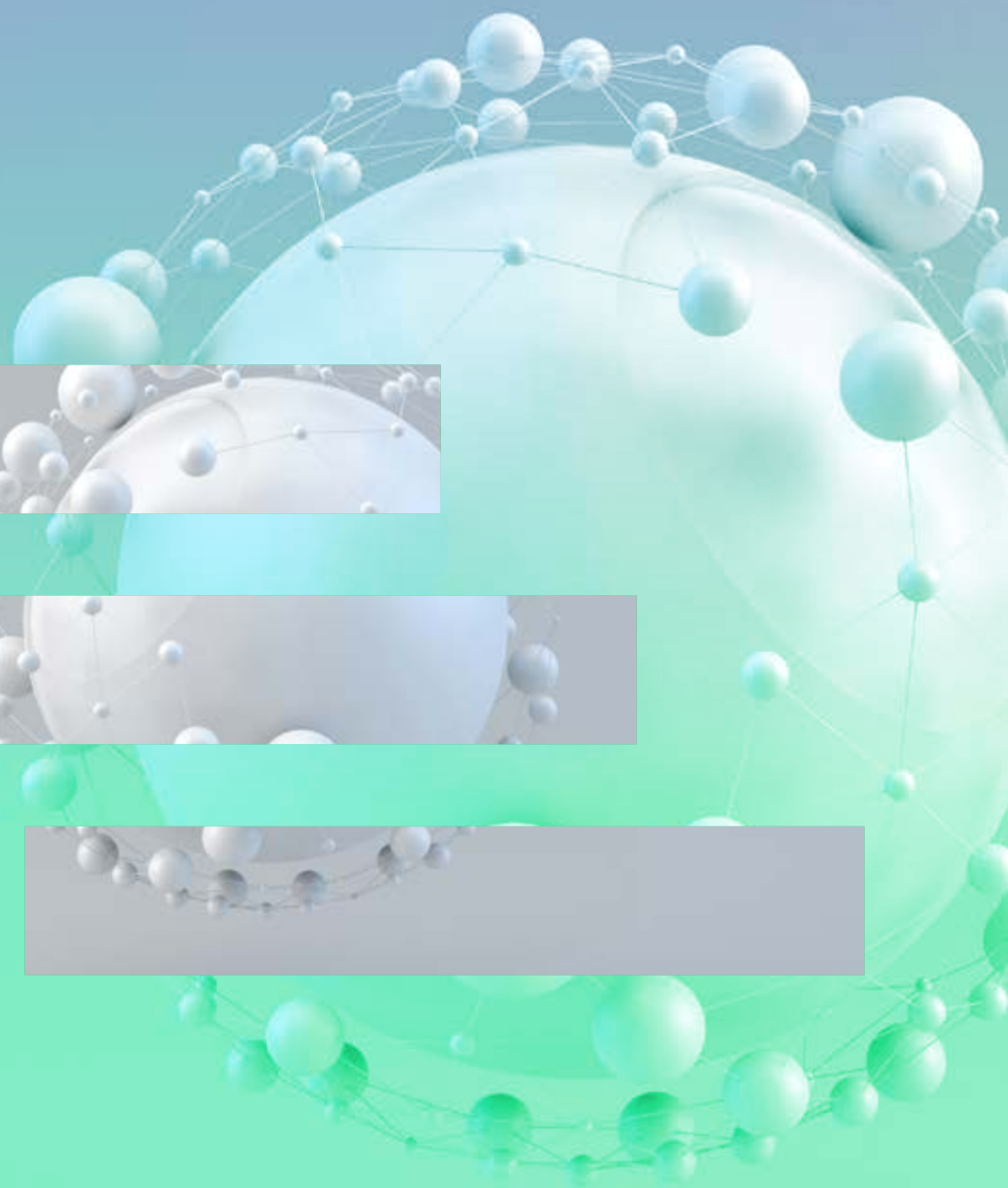
*Shown is the position of selected touchpoints among category buyers in sportswear.*

It is well-established that Owned Media (primarily Brand.com) can drive both engagement, sales, and loyalty for advertisers. However, our research indicates that all core marketing channels should also be assessed through a sustainability lens, and that specific tactics should be employed for channels that over-index both for pre-purchase research and that are associated most closely with sustainability as a topic (primarily Search & Online Video).

Measurement of the carbon emissions associated with a Brand's website and with their advertising, along with the reduction of said emissions, is an excellent first step for the industry, however sustainable marketing includes so many more opportunities than just decarbonisation.

Consider Sustainability at every stage in your marketing and media decision making.





**Get the  
message right**

# Our Purposeful Purchase Journeys research focused on,

brand strategy, shopper attitudes, and media touchpoints, less so on the strategy for effectively conveying sustainability messages within the marketing content itself. We want to reiterate, however, that it is still absolutely crucial to get the creative message right - particularly when it comes to sustainability- and purpose-related claims - especially as regulations tighten

around greenwashing and with more brands entering the space, citizens will start to see more of this type of messaging and will become more discerning as a viewing public.

With this in mind, and for the sake of completeness for all stakeholders across the marketing and advertising value chain, we include the below guidelines from the [Kantar Link+ creative testing database](#).

For further reading on this topic, we have provided a list of our recommended guides, resources, research papers and playbooks from our own businesses and from others across the industry in the appendix.

Key takeaways for Sustainability creative messaging from Kantar's industry-leading Link+ creative testing database:

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## 5 Tips to get sustainability right in advertising

### 1

#### Be authentic

Be true to your brand and where it stands in the field of sustainability

### 2

#### Understand your audience

and the psychological levers that will resonate given their attitude towards sustainability

### 3

#### Be constructive

Show how the brand can help make a difference

### 4

#### Get emotion right

Leaving people feel hopeful and confident is key to making them feel empowered to make change

### 5

#### Be relatable

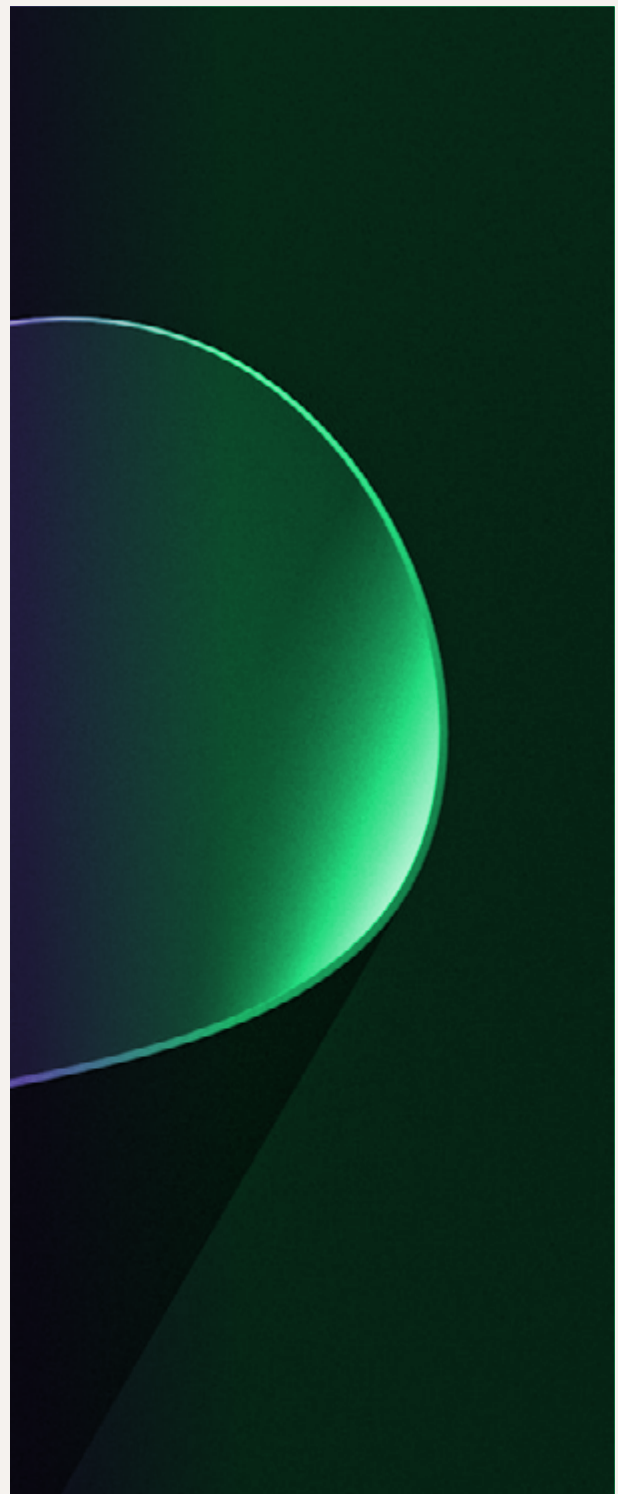
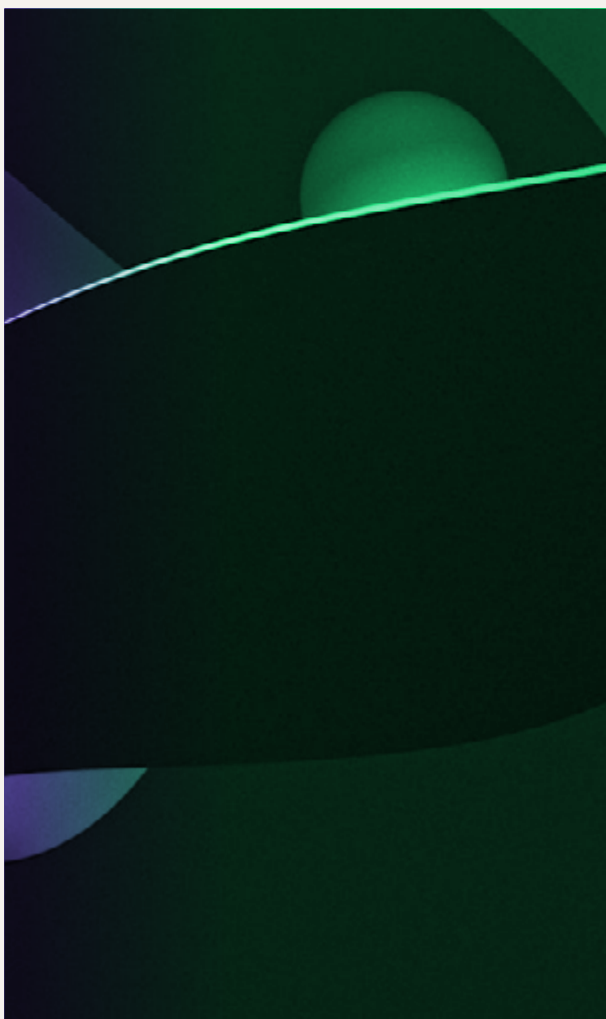
Make serious messaging accessible and relatable through the right tonality (e.g. humour)



# Final Conclusion & Recommendations

This whitepaper and the PPJ (Purposeful Purchase Journeys) research behind it demonstrate that brands can be both **purposeful** and **profitable** by leveraging sustainability throughout the path-to-purchase. Across all five verticals, we saw that

# Sustainability concerns were drivers for both brand affinity and purchase consideration



- to varying degrees depending on audience and category. Therefore, Sustainability is no longer a “nice to have” or an “add-on”, it needs to be a fundamental strategy within holistic communications planning. It needs to be part of everyone’s job. Citizens of all generations and backgrounds are already demanding more from brands - and we do not see this trend reversing over the coming years.

# Here are some of our key takeaways:

Brands that develop a Mission Statement should first

## identify the most relevant category-specific themes

that also fit well to the brand's heritage and promise.

## Sustainability is strategy

It must be brought to life and become relevant and tangible. A useful framework is to think of PAVE - Product, Actions, Value & Ethics - to ensure the different elements of sustainability and what the brand can do are covered.

As a rule of thumb:

## It is better to be honest

and outline efforts that make sense and are credible and adhere to them, rather than to be too bold, abstract and unclear which may lead to accusations of greenwashing.

## Sustainability is more than just environmental care or carbon-footprint measurement and reduction

Younger generations have a holistic perception of sustainable brands, with a strong stance on DEI and overall ethical values and behaviour - therefore these must be covered too. Familiarise yourself and your organisation with the [UN's 17 Sustainable Development Goals \("SDGs"\)](#) - and use them to inform decision making.

## Integrate sustainability strategies into your media planning

over and above just media decarbonisation

## Age or cohort targeting still has a place

if the media channel facilitates it and will be particularly effective if coupled with adjusted messaging.

## **The prioritisation of media touchpoints**

(channels and media owners) based on their relevance for sustainability will also generate higher media effectiveness

Brands should make their own website a core hub for their Mission Statement,

### **prioritising both traffic to, and engagement with their values & commitments**

For more sustainability mature verticals, brands should consider further paid, owned and earned touchpoints to spread these values further.

## **Invest in findability of the brand's Mission Statement**

instead of hiding it below the fold or buried in submenus or sub-pages - this will drive impact on both brand perception and sales.

## **Content remains key**

Sustainability is a journey, and brands should invest in high-quality content (primarily socialfirst video content) which will drive brand preference and facilitate behavioural change.

## **Adhere to best practice guidelines**

for developing sustainability-aligned creative executions, optimise them for different touchpoints (primarily TV, Online Video, Social and Search) and, if possible, utilise pre-testing in order to encourage campaign effectiveness.

We hope that this work encourages more brands and agencies to add sustainability-specific drivers into their pre-existing path-to-purchase research studies. We are also confident that this UK-specific research can be adapted and scaled across regions and countries, and shaped to specific local market contexts. Corporates, brand advertisers and the various stakeholders in their value chains bear an oversized responsibility to encourage positive sustainable behaviour change in their customer bases and, by extension, in society as a whole over the coming years.

The 2020s are a make-or-break decade for climate action, and therefore the need for nuanced understanding within marketing circles of how, when, and why to promote a brand's sustainability credentials has never been greater. We need everyone pushing in the same direction, using our unique behaviour change talents and skill sets to facilitate the mass adoption of sustainable brands, services, narratives and causes that align with the greener, fairer, more equitable, safer, more prosperous world that is ours to make.

## Authors

**Michael Hanbury-Williams,**  
*Head of Sustainability & Purpose, UM EMEA*

**Gabriele Herrmann-Scharnberg,**  
*Key Account Director, Kantar*

**Vicki Woodall,**  
*Senior Agency Industry Head, Google*

**Esther Fong,**  
*Intelligence Manager, MAGNA UK*

**Olivia Wilton,**  
*Senior Insight Executive, UM UK*

## Contributors

**Jonathan Hall,**  
*Managing Partner, Sustainable Transformation Practice, Kantar*

**Katharina Stockhofs,**  
*Senior Consultant, Kantar*

**Stefanie Exel,**  
*Associate Director, Kantar*

**Olly Higgs,**  
*Director, Audience Acceleration, Initiative*

**Rebeca Velez,**  
*IPG Mediabrands UK&I*

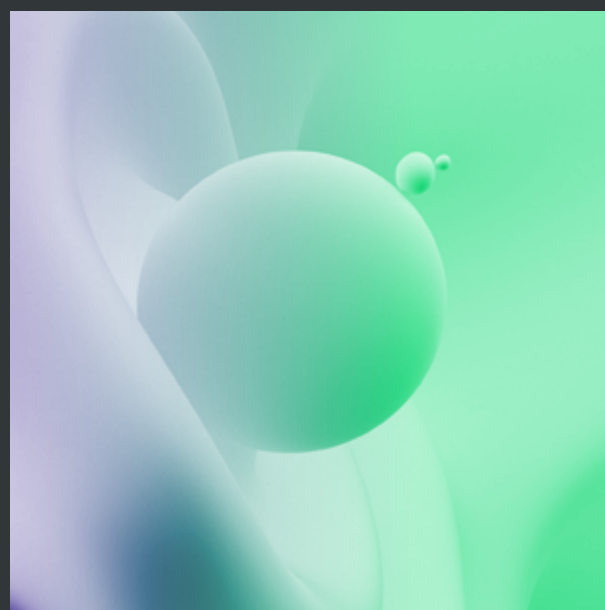
**Gerald Breatnach,**  
*Head of Strategic Insights, Google*

**Daniel Bendix,**  
*Agency Sales Manager, Google*

## Design

**Noel Cullen & Chris Howell,**  
*IPG Mediabrands*

**With thanks to:**  
*IPG Mediabrands UK&I, MAGNA UK, Google UK, Kantar Global*

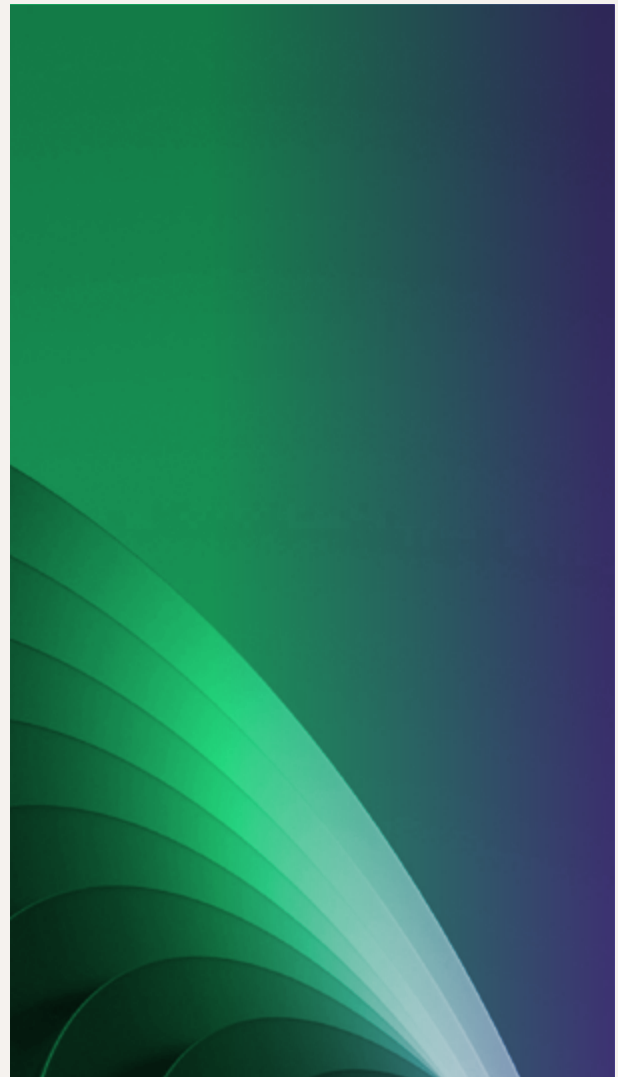
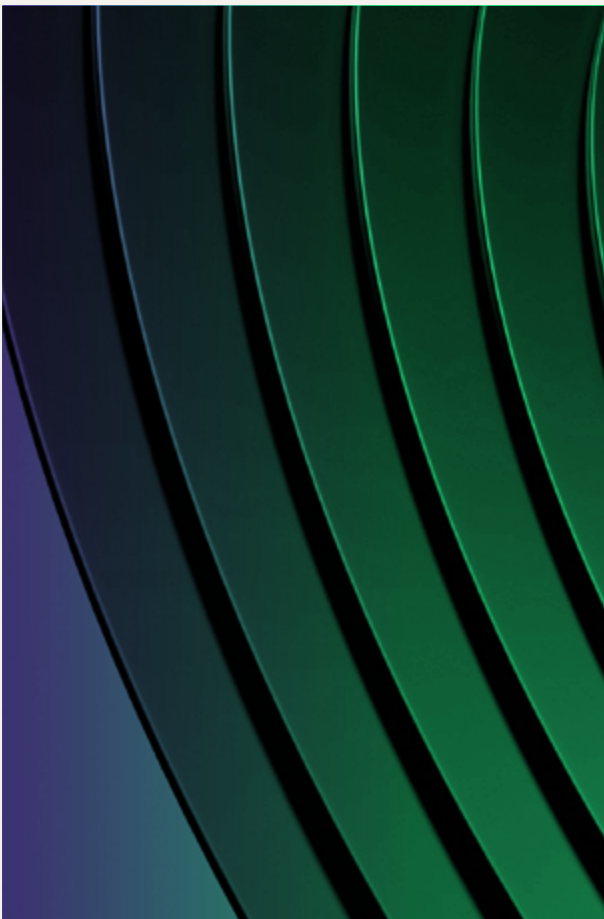




# Appendix

## Creative Playbooks / Guidelines For Further Reading:

- **(Global)** Kantar (EG:) [Getting Sustainability Messaging Right](#)
- **(Global)** McCann WorldGroup - [The Truth About Sustainability](#)
- **(US, UK, AUS)** Magna x Project Drawdown x Teads - [Sustainability Speaks, Breaking the Barrier of Climate Communication](#)
- **(Global)** New Zero World & Global Commons Alliance - [“A New Era of Climate Communications”](#)
- **(UK)** ITV and System1: [The Greenprint](#)



- **(UK)** Media Bounty - [Why Words Matter, Mastering Sustainability Messaging](#)
- **(UK)** The Public Interest Research Centre (PIRC): [The Narratives We Need](#)
- **(UK)** Imperial College London & UK GOV CCC - [Behaviour change, public engagement and Net Zero](#)
- **(US)** Yale - [Identifying Climate Messages that Work](#)
- **(Global)** The Stanford Social Innovation Review (SSIR) - [Using Story to Change Systems](#)
- **(Global)** Google x Project Drawdown [Sustainability Marketing Playbook](#)

## Full Methodology:

Details per research study are below. Each contained at least n=1,000 online interviews respectively and an interview length of not more than 20 minutes. Online representative quotas were based on age, gender and region.

	Meat-free product	Home electronics	Finance	Beauty	Sportswear
Market/Method	UK/ Online panel	UK/ Online panel	UK/ Online panel	UK/ Online panel	UK/ Online panel
Target Audience	Category buyers 18+ (within the past 6 months) or purchase intenders	Category buyers 18+ (within the past 6 months)	Acquirer of a personal current account (within the past 12 months)	Category buyers 18+ (within the past 2 months)	Category buyers 18+ (within the past 6 months)
Sample Size	n=1,000	n=1,017	n=1,010	n=1,034	n=1,005
Field Time	September 2022	December 2022	March 2023	September 2023	November/December 2023

# The Consumer Narrative

As far as possible, throughout this whitepaper we have avoided the term “Consumer”, instead opting for terms such as “Citizen”, “Person/People”, “Customer” and “Shopper” if necessary. This reflects the need to change the “Consumer” narrative in our industry and society, that is to say: seeing our audience as real people whose individual and collective power can be defined in so many more ways than simply by which product or service they choose to “consume”. As marketers we should aim to facilitate citizen empowerment through our influence, not simply facilitate consumption. We highly recommend Citizens by Jon Alexander and Ariane Conrad as further reading on this important point.

For further information or any questions, please reach out to:  
[rebeca.velez@mbww.com](mailto:rebeca.velez@mbww.com) or [michael.hanbury-williams@umww.com](mailto:michael.hanbury-williams@umww.com)

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**SUSTAINABILITY** KANTAR

# Sustainability and Purpose

PAVE the Path-to-Purchase