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The Rise of Sustainable Media

A global study into green consumer behaviours and how these redefine business environmental strategy for corporate growth alongside effective and authentic marketing.

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Foreword: No Longer Spectators

Sustainability has shifted from the margins, and niche projects, to a CEO and boardroom conversation about corporate purpose, growth and future strategy. As mainstream businesses, global corporations and governments focus their attention on the climate emergency, the speed of change both required and possible is increasing with more collaborative action, innovation and education. Failing to act will cost both the planet and humanity. It will also cost businesses directly through tarnished brand and reputation, lost customers, and the potential for new regulation, carbon taxes or fines.

In August 2021, the IPCC (the United Nations body for assessing the science related to climate change) published a report¹ which paints a dire picture for the future if urgent action is not taken. That stark warning was underlined at COP26 – the global climate summit – in Glasgow in November 2021, with a scale of business and public engagement never seen before. There are significant implications for us in how we live and work. We saw a need to explore the issue of climate change within media and advertising industry, considering its relative size (US\$634 billion), ability to influence and, strategic significance for all major businesses.

We set out to understand consumer perceptions of sustainable media advertising through a worldwide research project surveying more than

24,000 people globally from 19 countries. We compiled results and insights from countries including Russia, China, United States of America, South Africa, Italy, Brazil and the United Kingdom to characterise consumer attitudes and behaviours related to climate change to better understand how sustainable media advertising campaigns can help advance climate action while also growing brands.

There are diverse interpretations of the sustainable media ecosystem by market and sector and when it comes to sustainability, it is recognised the advertising industry needs to consider both its carbon footprint and its *brainprint*. However, in the context of this report, the scope of 'sustainable media' is media designed and delivered to limit its environmental footprint.

This report contains key findings of the global research and highlights the implications and actions for the boardroom when it comes to considering their business strategies and marketing campaigns. These actions are summarised at the end of this report into four strategies to consider for positive climate action and responsible business growth.

We hope these findings and insights help shape a future for sustainable media and advertising in every business and industry.

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An Introduction to:
**Sustainable
Media**



The Rise of Sustainable Media

Introduction

The onus to be ‘responsible’, which now requires focus across a wide spectrum of business and societal factors including social and environmental impact, diversity, equity and inclusion (DEI), privacy and protection, has never been so great.

In this single report it is not possible to address all of these factors, so we will narrow the focus firstly to sustainable actions and then, even further, to the role advertising and media has on the environment. The climate crisis has come to dominate public consciousness as never before and tackling this crisis requires the transformation of industry and society.

Given those massive stakes, dentsu and Microsoft Advertising conducted global research² to help business leaders understand where consumers stand on key climate issues and on what steps consumers think should be taken to confront the climate emergency. These steps aren’t limited to advertising, media and marketing but look at the wider social, corporate, and commercial implications for business and its bottom line.

According to this new research across the globe, 86% of people in the study responded they are concerned by climate change. In comparison, consumers had similar levels of concerns around the COVID-19 pandemic (85%), the health of their friends and family (79%), or the cost of living in their area (76%).

As such, businesses are under increasing pressure to prove their green ‘bonafides’ to employees, customers, regulators and investors. It is underlined by the rise to prominence of Environmental, Social, and Governance (ESG) investment, which is forecast to reach \$1 trillion by 2030, according to Blackrock.³

With increased attention (and financial scrutiny) corporations are applying more robust and transparent reporting frameworks and benchmarks, such as Science Based Targets to prove their credentials. These can take into consideration internally owned or controlled carbon emissions of an organisation (Scope 1) and even those outside of direct control of the business (Scope 3), such as advertising within its supply chain.

Description of Scope 3 Emissions

Scope 3 emissions are all indirect upstream and downstream emissions that occur in the value chain of the reporting company, excluding indirect emissions associated with power generation (Scope 2). The immensity of this challenge warrants action from policymakers, business leaders, citizens and industries as a whole.

Source: Science Based Targets Initiative - [Link](#)



In particular, private companies are faced with both a massive responsibility as well as vital business imperatives with regard to how they will address climate issues over the next few years. But this isn't a new concept. COP26, the Paris Agreement on Climate Change, and the United Nations Sustainable Development Goals (SDGs) have all acted to mobilise businesses and the world to lead the transition into a new economic and societal paradigm.⁴

It is clear that businesses can have a significant impact toward turning the tide of this climate emergency, including transforming their operations, logistics, where and how they work, sourcing, production and staff workforces.

The research findings implied a relationship between how people perceived the brand, its products, and the way it was advertising. But, more concerningly for business, a direct link to sales and brand perception associated with green issues and environmental impact.

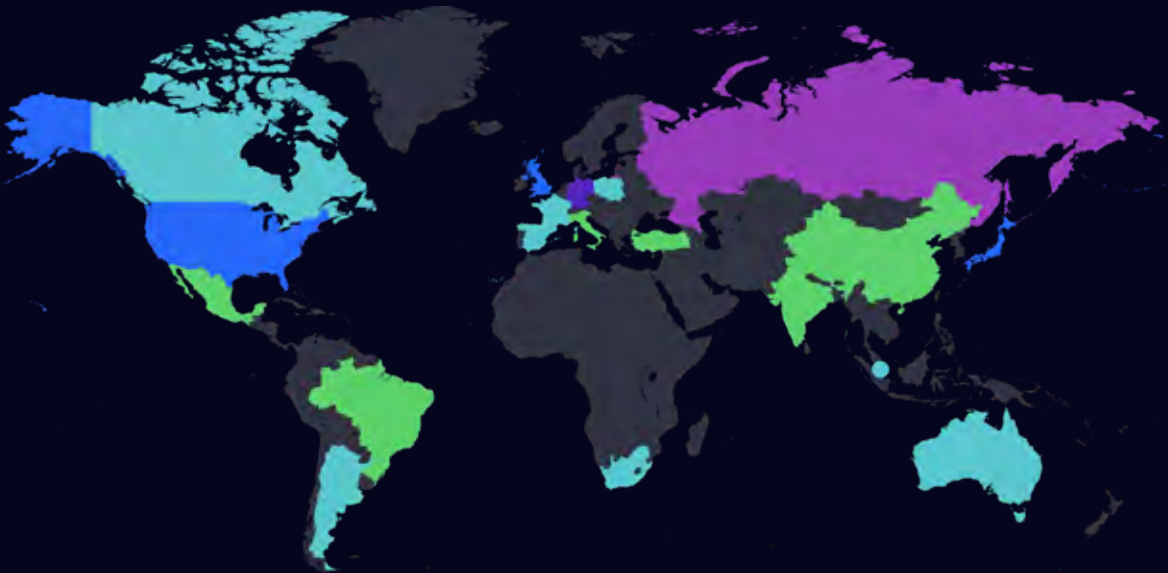
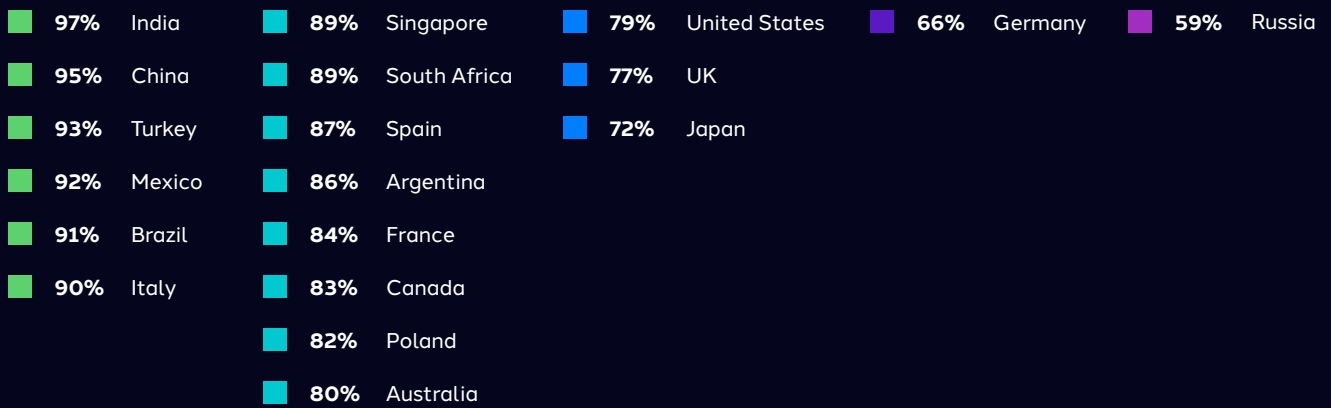
Given the speed and severity at which this climate emergency is impacting the planet, and its potential to transform industries, and create new markets, there is no time to be complacent. It is important for businesses to address all areas of carbon emissions in their control or within their supply chain.

Advertising is a source of a company's Scope 3 emissions which is rarely considered by boards but, according to our research, is increasingly recognised as important to consumers. This suggests, as part of the net zero commitments business and major brands are making, there is a need to establish a common standard for measuring and reporting on the carbon footprint of media advertising. To do this, businesses, governments and the advertising industry are going to need to work together.

Global propensity to stop using products and services which damage the environment.

“If I learned that the products or services I use are damaging the environment, I would stop using those products or services.”

% agreeing ■ 100%-90% ■ 89%-80% ■ 79%-70% ■ 69%-60% ■ 59%-50% ■ No data



Source: Dentsu International and Microsoft Advertising research commissioned for The Rise of Sustainable Media (survey: 24,068 adults across 19 countries, August 2021.)



01

Sustainability:
**Business
Opportunity
or Threat?**

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Sustainability:

Business Opportunity or Threat?

It is important to understand the context in which brands are perceived and, although this report will be focusing on the global view of sustainability in the most part - the regional and market variation in attitudes can be stark.

However, the consensus of those global responses from this research all lead toward a need for brands, businesses and governments to do more, to be more accountable and be more responsible for tackling the climate emergency.

A UNIQUE POSITION

Brands are uniquely positioned to help address the climate emergency and increasingly expected to do so by consumers. In fact, 91% of respondents agree companies can help people have a positive impact on the environment through their business operations and manufacturing processes.

There is also equal interest in not only a company doing the right thing for the planet, but also to show by example with 91% of people wanting brands to demonstrate they are making positive choices about the planet and environment more explicitly in everything they do.

There is an opportunity for marketers to use their storytelling prowess to make sure people know exactly what they are doing to fight climate change, but also on the CEO and boardroom to make and empower positive choices about the planet and environment.

THE NEED FOR REINVENTION

Brands have little choice but to respond, as the climate emergency represents both a threat and opportunity to their business:

- Overall, 88% of global respondents say they will make sustainable purchases when able.
- 81% of respondents in North America say they would stop using or buying products if they found out they hurt the environment.

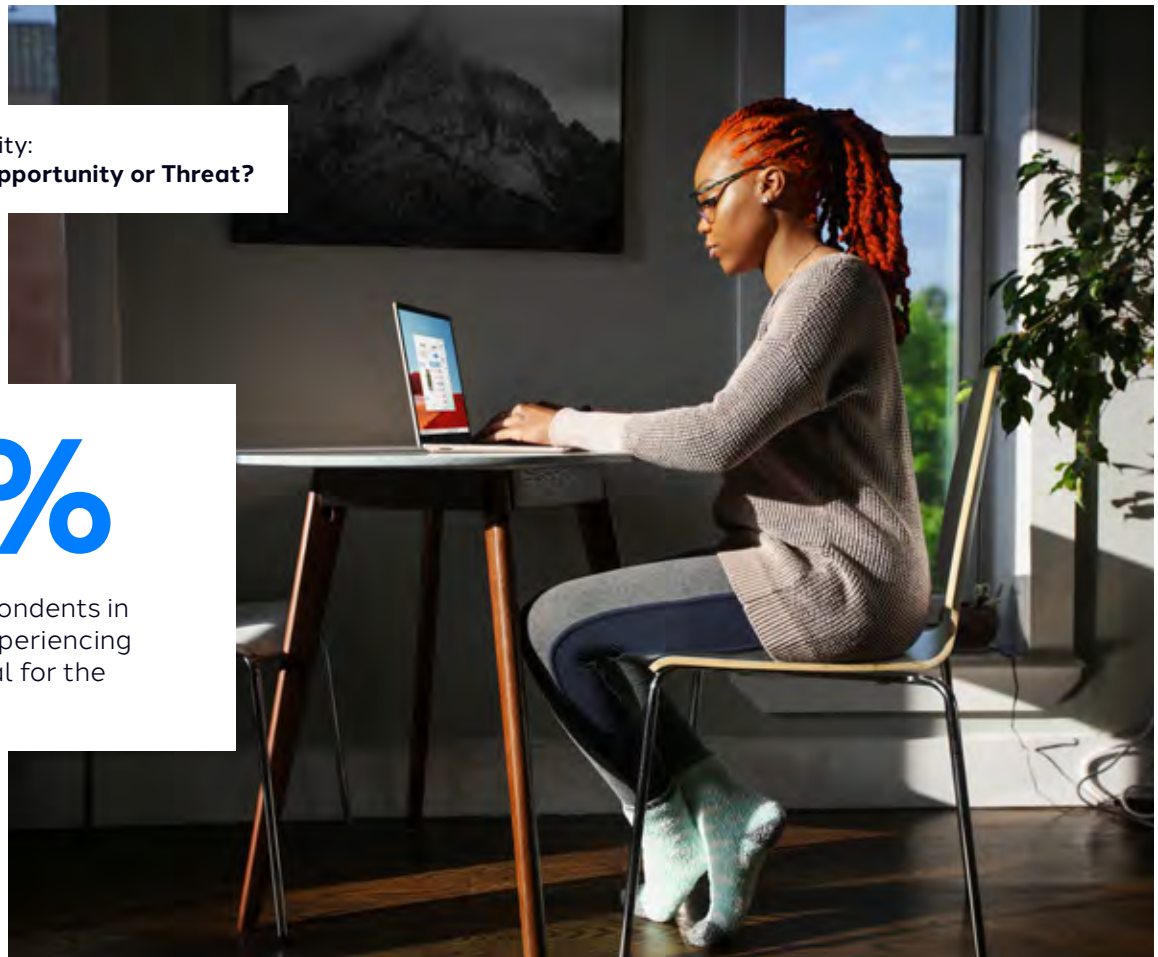
Companies have an opportunity to capitalise on this consumer sentiment and demonstrate efforts to become more sustainable across the board, including reducing or removing carbon emissions, while also reorienting their profit centres.

88%

of global respondents say they will make sustainable purchases when able.

81%

of millennial respondents in APAC perceive experiencing ads as detrimental for the environment.



Almost half (48%) of those surveyed said reducing carbon emissions from the supply chain would make brands or companies greener in their eyes. The same proportion (48%) said the same of offsetting efforts such as planting trees or funding environmental protection or restoration projects. The impact of both in tackling the climate emergency can be positive, but the focus should be about reducing carbon emissions where possible first, then look to neutralise what's left.

However, advertising and media, as crucial as they are in delivering messages about climate change, also contribute towards carbon emissions, although consumers aren't yet fully aware of their impact:

- Only three-fifths (61%) of those surveyed view experiencing an ad as having a negative impact on the planet.
- This jumps to 72% in APAC, where, in fact, the younger generation is even more aware of the impact as, 81% of millennials respondents perceive experiencing ads as detrimental for the environment.

This younger deep awareness and concern around the wider environmental issues, coupled with the increased public attention around climate change through global events like COP26, indicate awareness and attention will likely increase, and rapidly.

A large majority of respondents (84%) say they would be more likely to buy from a company that practices sustainable advertising.

Defining sustainable media and advertising, and demonstrating its value for the planet and for businesses will be imperative for leading brands over the next few years. Even more so for those attuned to avoiding potential future carbon fines or taxes.

As the world moves from talk to action, establishing a 'carbon conscious' advertising approach is vital and should become de facto for any future plans, forming part of the solution for any climate responsible business intending to walk the walk.



02

A Deep Dive Into
The Global Research
**Green Living Is
Mainstream**

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A Deep Dive Into The Global Research

Green Living Is Mainstream

The willingness and desire to actively embrace green living has crossed over to the mainstream:

- 87% of those surveyed say they want to do more to combat climate change.
- 87% say they'd be willing to change which products and services they buy to do so.
- 86% agree with the idea that changing the way they live can positively impact climate change.

However, many consumers don't know where to start and feel overwhelmed by options and conflicting information; 84% of the respondents say it is difficult to know whether brands and companies are truly good green citizens.

Yet, the research also showed an apathy by even the climate conscious consumers to go out of their way when it comes to green living. In fact, 39% of those concerned about the climate emergency go as far as to say they will support combating climate change, but only when it's convenient for them. This means businesses and brands need to step-up and help to break down any potential hurdles – and offer green options up front.

AUTHENTICITY OF GREEN CREDENTIALS

42% of people in the study think brands should provide clear, comparable information on the footprint of their products and advertising in order to make the brand greener.

Perhaps this expectation is evidence of the desire to combat the proliferation of complex or selective green messaging and claims of sustainable products and practices by organisations.

Brands have an opportunity to lead on establishing and communicating green credentials through standardised reporting within sectors and across industries to help combat greenwashing:

- 43% of respondents say clear labelling of green credentials on websites and social media will help determine which brands are truly environmentally friendly.
- Similarly, more than a third of respondents would look for either transparency of reporting (36%) or independently audited credentials (34%) to help them evaluate the company's green status.

Standardised reporting will help build trust in those companies genuinely making an impact, and with transparency of this reporting consumers will be able to see through those who are greenwashing. In fact, 46% of respondents say they already look for clear labelling of green credentials on a brand's advertising to determine if the brand is environmentally friendly.

88%

of those surveyed agree that they will have more trust in brands which have their green credentials verified independently.



THE IMPACT ON BRAND REPUTATION

Businesses should lean into the positive climate choices they're making and implementing as these choices affect brand reputation and value. Marketers should play a role in pushing for the establishment of independent, third parties to track companies' true carbon footprints and other environmental impacts.

- 88% of those surveyed agree that they will have more trust in brands which have their green credentials verified independently.
- Regionally, APAC saw the highest level of agreement with this need - 90% -followed by EMEA (87%) and Americas (85%).
- This sentiment varies significantly by country. For example, 97% of consumers in India agree brands should independently verify their green credentials, versus 74% in Germany.

Beyond their own products, businesses and marketers will have to grapple with the environmental impact of the ads they create and the media they purchase.

Today, media delivery and consumption has yet to become fully associated with carbon emissions in the public eye.

- Just one in seven (15%) people from the study think browsing the web contributes to climate change.
- Whilst just 17% perceive watching TV as contributing to carbon emissions, 14% say the same about gaming and 11% in regard to streaming music.

However, as much as digital media consumption appears to broadly have a free pass from green-conscious consumers, there are some notable exceptions in certain countries.

- 41% of respondents in France see surfing the web negatively impacting climate change.
- With other notable results from respondents in India (21%), Australia (20%) and Germany (20%).

Conversely, attitudes regarding web usage appear markedly different in the Americas. Just 11% of respondents in the US see the web as impacting the environment; the figures are even lower in Argentina (9%) and Brazil (6%).

14%

(one in seven) of those who consider the delivery and consumption of advertising having a negative environmental impact, claim to have taken action with regard to how they engage with those brands.

THE TIDE IS TURNING

The 'free pass' for the CMO on the sustainability footprint of media may be coming to an end. With consumer and societal engagement on environmental issues and climate action at an all-time high, it won't be long before attention shifts to the downstream impact of advertising and media. It's not hard to see consumers soon rethinking their views on media; similar to the shift seen in recent decades of paper being considered the ultimate symbol of waste or plastics now being increasingly vilified.

In fact, already one in seven (14%) of those who consider the delivery and consumption of advertising having a negative environmental impact claim to have taken action with regard to how they engage with those brands.

Respondents put governments (51%), businesses/brands (43%) and the advertising industry (41%) ahead of themselves (36%) for accountability on decarbonising the way they experience advertising.

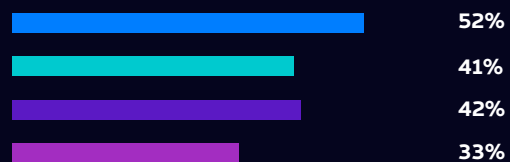
Consumer view on who should be held most accountable for the decarbonisation of the way they experience advertising.

■ Government ■ Brands ■ Ad Industry ■ Consumer

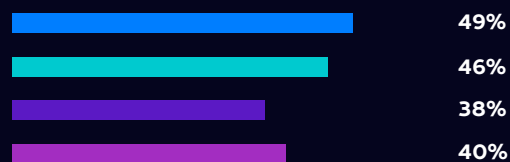
Americas



EMEA



APAC



(% of respondents selecting each answer)

Source: Dentsu International and Microsoft Advertising commissioned independent research with Opinium: survey of 24,068 adults across 19 countries, August 2021



21%

(one in five) respondents would change the search engine they use for a more environmentally friendly alternative.

Governments, businesses and marketers have time to frame the conversation around this topic, but not much, as it is the younger consumers and a generational divide driving this perception shift. Just 45% of Boomers in the global survey believe consuming ads to be negative for the environment, compared with 71% of Gen Z and 73% of Millennials who share this sentiment.

This green reframing must be more than just words and messaging, and must be grounded in positive brand action and media choices.

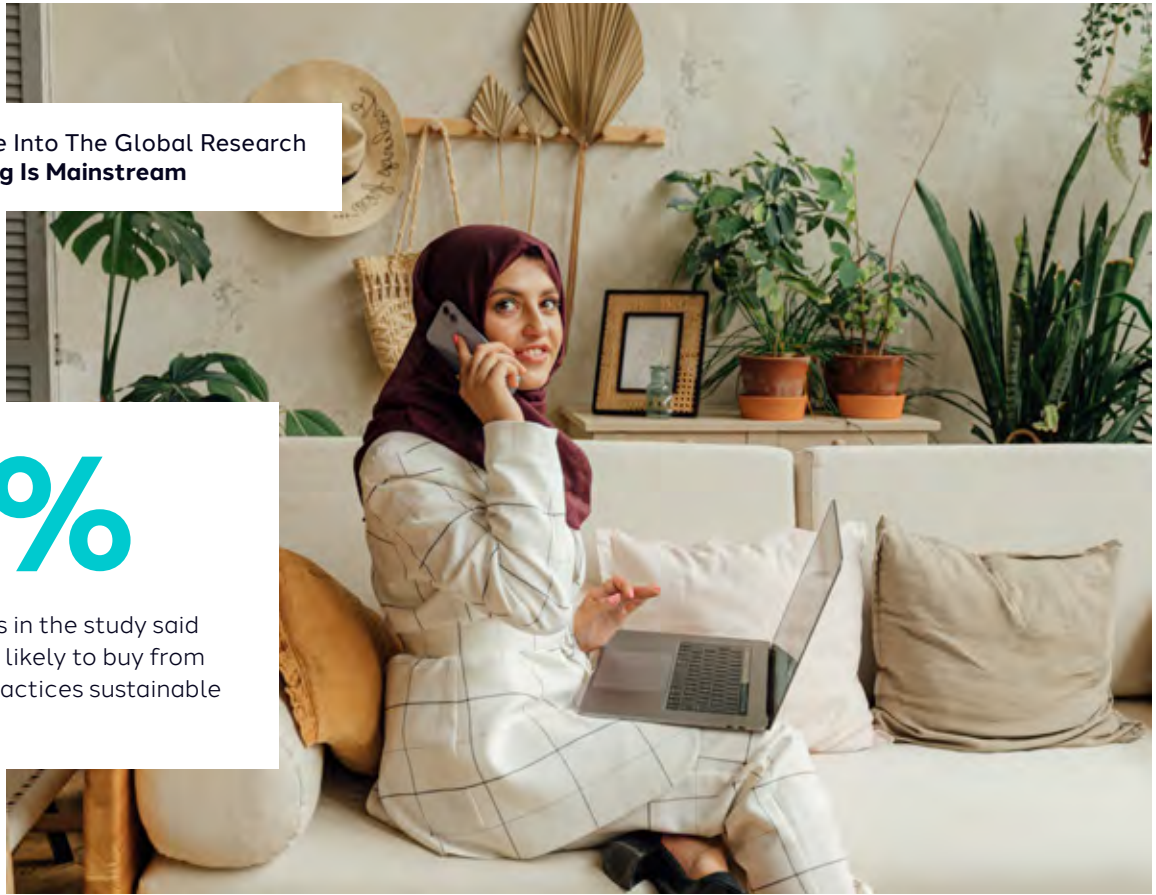
Sustainable media should also fall not only to the impact of digital campaigns, their development, transmission and consumption, but also to other channels including print, TV, Out of Home (OOH) and customer experience.

In fact, the global research shows a willingness to switch media platforms to aid with the climate emergency. Consumers are ready to opt-in to a better, greener way of sustainable media advertising.

- One in five (21%) respondents would change the search engine they use for a more environmentally friendly alternative.
- A quarter (25%) of people in the study say they would actively avoid or opt-out of adverts which aren't produced or delivered sustainably.
- Whilst 59% are likely to buy a service/channel subscription which only shows environmentally friendly advertising from brands.

84%

of global consumers in the study said they would be more likely to buy from a company which practices sustainable media advertising.



Early hesitation around environmental change by business leaders was often encapsulated in the phrase “sustainability is only sustainable in the long term if it is sustainable for the business.”

Whilst still true, it should probably be updated to better reflect the world today, which would be **“sustainability is the only real way to attain long-term sustainability for the business.”** This is supported by the research, where 45% of respondents say they would consider alternative brands, companies or services which are greener or more environmentally friendly than their current choices.

This holds true for every aspect of the business operations, both up and down the supply chain, as the general consumer doesn't always clearly identify where one business stops and another starts. Indeed, a large majority of consumers who took part in the research globally (84%) say they would be more likely to buy from a company which practices sustainable media advertising.

Defining sustainable media advertising in real terms is a core challenge for businesses.

They must be able to clearly understand the terms, to engage with them easily, and to report against them to their customers and investors. This is something which needs to be addressed soon, as many consumers are defining this on their own and are making choices based on their understanding.

- Nearly half of the respondents (46%) say that they will buy from companies that have sustainable products and operations.
- 30% of these respondents say they are willing to pay more for brands that offer a greener/more environmentally friendly alternative.

Brands have an opportunity to demonstrate just how they create and deliver sustainable media as a means to engender loyalty - as 38% of respondents say they would trust this type of brand more than others.



03

The Implications Of
Sustainable Media For Business

Where Green Becomes Gold



03

The Implications Of Sustainable Media For Business

Where Green Becomes Gold

Businesses and brands shouldn't shy away from exercising their powerful, unmatched ability to drive behaviour and consumption. On the contrary, now is the time to act, to make positive environmental change and lead by example for customers, for industry peers and even for governments.

The research clearly shows a correlation between a brand's environmental behaviour and its customers' intention to purchase. For businesses this means green is actually closer to gold and therefore something which needs to be embedded for the good of the company as well as for the planet.

The drivers for board room action on water, waste, carbon emissions and other environmental issues have included efforts to navigate and prioritise the UN sustainable development goals,⁵ proactive responses to national policy and regulation and, stakeholder or investor attention. This combination of levers has meant customer and corporate attention has shifted from not just what a company does itself, but the influence and impact that rests in its

77%

of people globally say in five years' time, they only want to be spending money with brands who practice green and sustainable advertising.

supply chain. While the lines still remain blurred on where that accountability falls and how the customer perceives the sustainable effort, the prudent business will need to be covering all bases (up and down the supply chain).

The dentsu and Microsoft Advertising research also identified a significant opportunity for those brands prepared to embrace sustainable media advertising. More than three quarters (77%) of people globally say in five years' time, they only want to be spending money with brands who practice green and sustainable advertising.

The Implications of Sustainable Media For Business Where Green Becomes Gold



The responsibility for driving this change, however, is not with businesses alone; the advertising industry also needs to pave the way for meaningful progress in this space. Already, there are encouraging examples of where brands and the industry have started to address the climate emergency head on and as part of wider campaigns, for example:

- Pivoting digital spend to low/no carbon providers and shortening the journey from data centre to audience.
- Ensuring traditional OOH displays are produced on recycled paper or using carbon eating paint for murals.
- Incorporating elements of search spend in platforms offering carbon off-setting.
- Measuring the real carbon impact of digital media content throughout the lifecycle of a campaign (e.g., through calculators such as DIMPACT).
- Combining innovative technologies such as live local data, Augmented Reality and facial recognition to educate audiences about their environment through engaging and immersive experiences.

The media industry is also continuing to evolve at a rapid pace and repositioning itself to better inform and provide, as standard, a low carbon portfolio to its clients. A key step on this journey is to accurately map emissions across the entire media ecosystem and develop a holistic scorecard for brands to make more informed decisions about their media plans and the implications those plans have on their brands and business.

SHORT-TERM GAIN VS. LONG-TERM GOALS

The most successful companies globally have long-term business goals informed by the board and CEO and this shouldn't be any different when it comes to embedding sustainability into the marketing mix. Typically, there's an urgent need for marketers and CMOs to deliver results against campaigns in the short term. These campaigns must form part of the glide path to the larger sustainability goals of the business.

In many cases, this endeavour is not about just making tweaks, but rethinking everything, and some businesses may need to start with a blank slate. This may seem daunting considering the urgency of the climate emergency and the legacy of a business's marketing behaviour, however it is better to plan than to panic (and then re-do decisions made in haste).

DIMPACT - Measuring the real carbon impact of digital media content. Dentsu has partnered with Bristol University's Department of Computer Science along with some of the world's most innovative media companies to launch DIMPACT. This initiative aims at developing an online tool that calculates the greenhouse gas emissions associated with digital media content. Using DIMPACT's prototype calculator, Netflix⁶ has been able to estimate that the global average carbon footprint of one hour of streaming is well below 100gCO₂e (grams of carbon dioxide equivalents).



To conclude, everyone is responsible for making positive change and tackling the climate emergency. It requires a human and societal change. However, businesses and brands, regardless of their carbon footprints, have a big *brainprint*. They have the potential and opportunity to influence at scale and therefore need to lead the charge on this change by elevating authentic and transparent sustainable brand messaging for every company.

They need to go beyond just words and demonstrate change in all of their actions in order to walk the walk and lead by example inside the company and throughout the supply chain. Adopting sustainable media advertising not only helps to serve this purpose but helps brands to connect with and positively influence people's consumption and behaviours to have a more sustainable impact on the planet.

While consumers are already making decisions based on the perceived environmental impact of product attributes and how they are made, the impact of media and ad consumption has yet to become clearly defined in the public arena. There is an opening for brands to now shape this conversation globally.

When it comes to sustainable media, individual marketers, both brand and agency side, can and should lead, but bringing about real impactful change will require atypical levels of cooperation, trust, and accountability throughout the entire marketing ecosystem.

Responsibility for achieving true 'carbon conscious' advertising lays with agencies, brands, media companies, tech providers, industry bodies and governments. Only through working together openly and transparently can real and rapid change occur for the betterment of all.

Four Strategies Businesses Must Take To Implement Change



Creating a sustainable balance between consumption and production encompasses action on transparency, technology, engagement and leadership.

1

GET CANDID ON CLIMATE.

Clear, effective, open measurement and communication will be vital across the media supply chain. Businesses must begin collecting credible, verifiable data on the true environmental impact of their media buys and ads and communicate this to their stakeholders, and their consumers. Agencies and brands must work together to confidently demonstrate how sustainable ad campaigns will perform versus traditional campaigns.

With authenticity already a key motivator in Millennial and Gen Z purchasing intent,⁷ we see this mirrored in the research with 82% of millennials in the study saying in five years' time, they only want to be spending money with brands who are practicing sustainable advertising, as opposed to only 75% of Gen X; consumer views will soon translate into purchasing behaviour.

2

SHAPE THE CULTURAL CONVERSATION.

The mission of brands, platforms and agencies who are invested and passionate about making critical change should be to get society engaged in and thinking about sustainability, all the time. This means the relationship between brands and consumers must evolve and be broader than simply image and product.

84% of respondents want to make a shift toward more positive 'green' action – it is creative campaigns and communication strategies which help guide consumers toward that intent and action. Businesses should use the power of advertising in bold, powerful and positive ways.



3

TAKE TECHNOLOGICAL RESPONSIBILITY.

43% of consumers in the research place the responsibility of de-carbonising advertising on the businesses advertising, second only to governments (51%). Consumers are becoming conscious of the role of business in driving sustainable practices through their media production.

On media buying, major tech giants are already making moves towards carbon-neutral ways of working. Media plans also need to evolve to include carbon-neutral options, and businesses need to provide estimates of the environmental impact of individual campaigns in an accurate and consistent way across the industry.

4

LEAD, NOT FOLLOW.

A growing number of organisations are pioneering on climate action, including aiming for the highest level of climate ambition – a science-based target – to achieve global net-zero before 2050. Consumers are engaging and challenging on brands’ sustainability and climate action: 42% of respondents think brands should provide clear, comparable information on the footprint of their products and advertising to make the brand greener.

As a brand, taking leadership on these issues now encompasses action throughout a business supply chain including advertising and media. It’s a new frontline for growth, reputation and loyalty.

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Survey Methodology

Dentsu International and Microsoft Advertising commissioned independent research with Opinium for The Rise of Sustainable Media: survey of 24,068 adults (18+) across 19 countries, August 2021. This was conducted via online survey to nationally represented samples of people: 2,000 in the USA, 1,006 in South Africa, 1,002 in Australia, 2,000 in Canada, 1,000 in Brazil, 1,000 in Argentina, 1,001 in Germany, 1,000 in Poland, 1,000 in Italy, 1,000 in Turkey, 1,000 in Russia, 2,002 in India, 2,000 in China, 1,038 in Japan, 1,000 in Singapore, 2,008 in the UK, 1,000 in France, 1,000 in Mexico and 1,011 in Spain. For more details on the methodology or specifics relating to the questions/answers offered to participants within this research, please contact media.pressoffice@dentsu.com

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Sources



¹ IPCC, The Working Group I contribution to the Sixth Assessment Report, August 2021 - [link](#)

² Dentsu International and Microsoft Advertising commissioned independent research with Opinium: survey of 24,068 adults across 19 countries, August 2021. All figures cited in this document are excerpted from this research, if not specified otherwise.

³ BlackRock - Reshaping sustainable investing, June 2021 - [link](#)

^{4,5} United Nations, Department of Economic and Social Affairs, Sustainable Development, The 17 Goals, as accessed on October 15th, 2021 - [link](#)

⁶ Netflix, News, The True Climate Impact of Streaming, June 2021 - [link](#)

⁷ IRI, Press Release, IRI Uncovers Distinct Purchase Motivators of Emerging and Powerful Generation Z Shoppers, April 2018 - [link](#)

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