

# CARAT

Designing for People

## Designing For People: Sustainable Media



a dentsu company





At Carat we believe that the world would be a better place if all relationships had more empathy.

In media this means designing connections that earn people's attention by creating value in their lives.

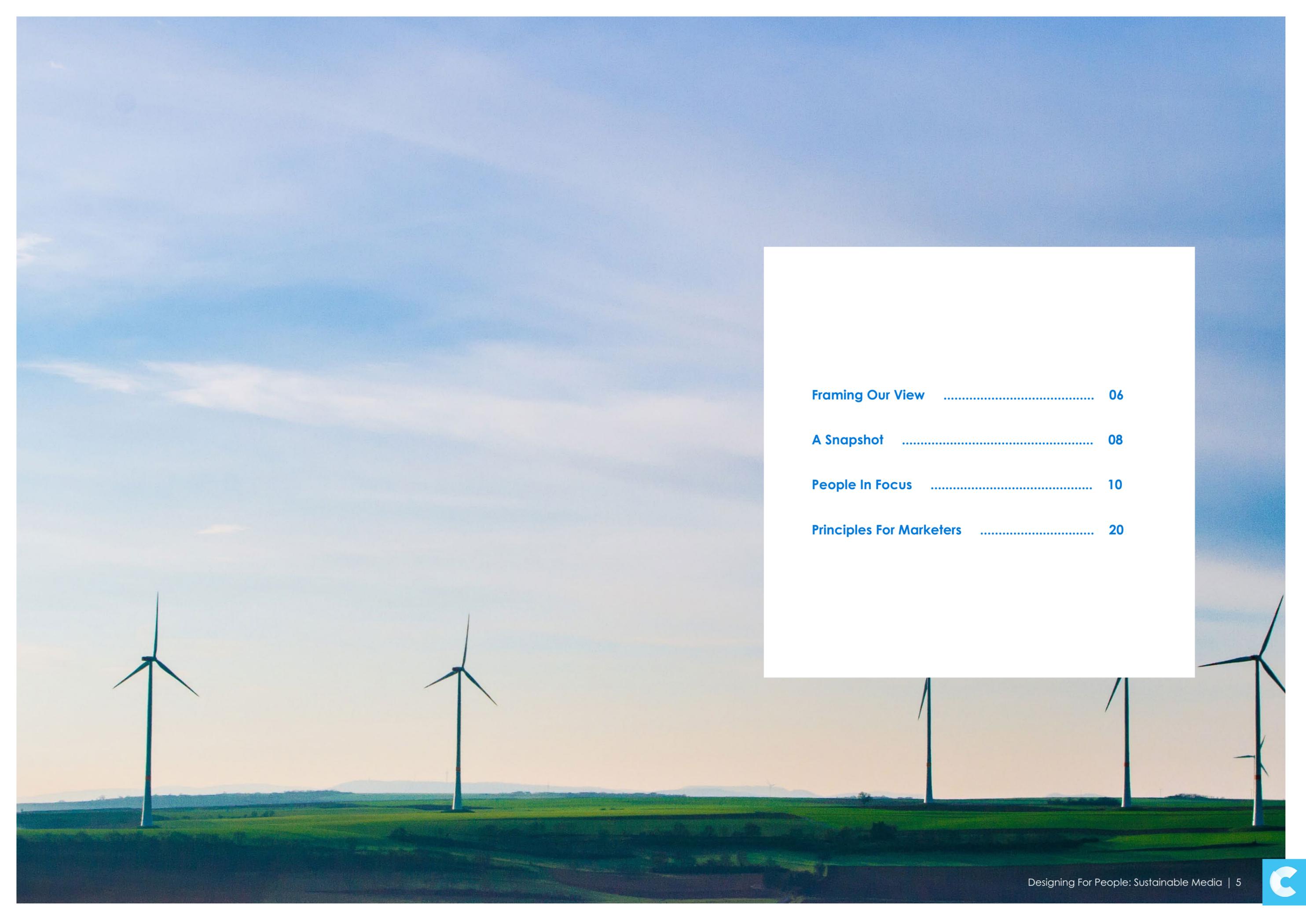
To do this we put an understanding of people at the heart of everything we do.

**We call this Designing For People.**

In this report you will get a taste of how Carat goes beyond surface level 'consumer' and 'demographic' traits and into profiling the rich attitudinal and behavioural cohorts of people that exist.

It's this depth of understanding that enables us to unlock the value exchange upon which sharper connections between people and brands are built.





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# Framing Our View:

## Sustainability, Marketing & Media

Australians are constantly confronted by the seriousness of sustainability.

News of wild weather, from floods to bushfires to drought, is inescapable. Climate change policy has been a feature of every recent election. World leaders meet at conferences like COP26, and students march every year the School Strike for Climate.

The warming planet is no longer a distant issue, but a very present threat, and not one that people – or brands – can ignore any more.

As a result, marketers and agencies are talking about sustainability more than ever before.

For some, these conversations have been going for decades. For others it's very new. In many categories sustainability is becoming a hygiene factor for doing business, and it's on the radar of every stakeholder from the customer to c-suite.

The goal of this whitepaper is not to define what sustainability is, or why sustainability is important, (although it does touch on those subjects).

Instead, our focus is on what sustainability means to different people, and how brands around the world can deliver a sustainability message to people through media.

There are many aspects of sustainability, which are captured in the UN's [17 Sustainable Development Goals](#) – perhaps the most prevalent modern definition of sustainability. It's goals include 'No Poverty', 'Quality Education', 'Good Health and Well-Being' 'Gender Equality', alongside goals for the natural environment like 'Climate Action', 'Life Below Water' and 'Live On Land'.

This definition captures the interconnectedness of these many factors; a point that will become clear in this whitepaper.

But in the interest of brevity, we've narrowed our focus to a specific aspect of sustainability: the natural environment, and people's impact upon it.

**This whitepaper explores this across three chapters.**

First, we start with a snapshot of sustainability in 2022, to understand its rapid pace of change. We draw upon the rich insights of dentsu and Microsoft's global study, *The Rise of Sustainable Media* ([available here](#)), and we apply an Australian-centric lens.

We then look at people, leveraging our proprietary research panel, Consumer Connections System (CCS), or CCS. CCS is the world's largest single source consumer survey, available in 65 countries including Australia. We were the first agency group globally to invest in this type of panel data and we've been investing annually every year for over 20 years. This custom database provides us with unique consumer insights and the ability to perform in depth consumer segmentation at dentsu.

Using CCS, we examine four audience cohorts through the lens of sustainability. We look at their demographic differences, the size and opportunity of each cohort, and how brands should communicate differently with each.

Finally, we identify six principles for marketers, with topics from distinctiveness to relevance and simplicity. For each principle we share practical, best-in-class examples from brands around the world who are behaving sustainably and communicating it well, to guide marketers looking to do the same.



# A Snapshot

The majority of Australians are on board with sustainability.

3 in 4 say that the issue of climate change is important to them personally<sup>1</sup>. 80% of Australians say that if we don't act now, we'll never control our environmental problems<sup>2</sup>, and the same amount agree that if they learned that the products or services they use are damaging the environment, they would stop using those products or services<sup>3</sup>.

The challenge is, it's difficult for the average Australian to know how to act and which brands to support. This is true for a few reasons.

Firstly, sustainability is difficult to understand. The environmental impact of what we consume is often obstructed by the complex supply chains and processes that come with manufacturing and distributing products. 84% of people agree it is difficult to know whether brands and companies are truly good green citizens<sup>4</sup>. How can individuals – with their own priorities and responsibilities – decipher which brands are doing a better job than others?

Second, buying sustainably can be very expensive. That is certainly the perception – while 97% of Australians agree that individuals can be more sustainable through the products they buy and the businesses they choose to support<sup>5</sup>, and 88% of people say that they would make sustainable purchases when able, only 40% are prepared to pay more for eco-friendly products<sup>6</sup>.

And third, it can be difficult to behave sustainably. People feel powerless and fatigued at what they can do as an individual to help the planet, and there is an entire genre of articles dedicated to the topic, "what can I do about climate change"<sup>7</sup>.

COVID and the rising cost of living have only exacerbated these tensions and brought the competing threats of the present and future to the fore. People want to reduce their waste footprint, but they need to use disposable masks to protect their health. They want to use less energy, but they need to drive to work, or fly by air to visit family overseas. They want to buy more sustainable products, but they can't afford the eco-friendly products on the shelf.

There is a very clear role here for brands – to make the world of sustainability easier to navigate, to

understand what products and features people should be looking for, and to inform their purchasing power.

Brands who can help solve these needs will build mental availability among those people who prefer sustainable options, and they will capture the ever-growing demand for those products.

Sustainability is not only crucial for consumers – it's true of all stakeholders.

Business owners and investors are betting on sustainability. 98% of Australian investors now evaluate 'non-financial disclosures' like ESG metrics<sup>8</sup>, as their perception of profitability has shifted to a longer-term view. And it's working – 6 in 10 sustainable funds delivered higher returns than equivalent funds over the past decade<sup>9</sup>.

Your competitors are likely taking action too. Most brands are – only 11% of surveyed marketers and agencies say "we are not tackling sustainability and climate issues"<sup>10</sup>. The remaining 89% are considering everything from product manufacturing, to packaging, to public commitments, to corporate policies.

And it's very likely that it's important to you and your team. Working for a sustainable brand isn't the number one concern for most people. But if they can, people prefer to work for brands that align with their values, and as the statistics throughout this whitepaper indicate, most people care about sustainability. In any case, it's a great opportunity for the marketing department to take a lead, as the people who know the customer best.

We can help your businesses understand the nuances of sustainability, its implications, and what to do next. That starts with an understanding of our audience.

<sup>1</sup>Nine, State Of The Nation: Sustainability

<sup>2</sup>dentu's CCS panel

<sup>3</sup>dentsu & Microsoft, The Rise of Sustainable Media

<sup>4</sup>dentsu & Microsoft, The Rise of Sustainable Media

<sup>5</sup>Nine, State Of The Nation: Sustainability

<sup>6</sup>dentu's CCS panel

<sup>7</sup>See examples in The Cut and The Guardian

<sup>8</sup>EY (via AFR)

<sup>9</sup>Morningstar (via FT)

<sup>10</sup>WARC, The Marketer's Toolkit 2022





## People in Focus

In this section we explore what sustainability means to different people.

Using CCS, we have divided the Australian population into four cohorts along the same sustainability spectrum, based on how likely they are to agree with the statement, "I am prepared to make lifestyle changes to benefit the environment"

There are people who really care about sustainability. People who care. People who are neutral. And people who don't care.

For each cohort, we analyse who they are; the size and opportunity of each cohort; and how brands should speak differently to each of them about sustainability.

You will see that demographic traits have little impact on people's sustainability attitudes – it's more complex than just age or gender.

You will also see that the best target for most sustainability campaigns is the 'People Who Care' cohort, because they are the most receptive to sustainability campaigns, and offer the most volume. More ambitious brands can aim to influence the other three cohorts.



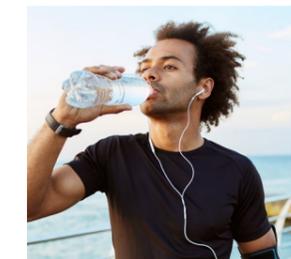
People who really care about sustainability



People who care



People who are neutral



People who don't care



## People Who Really Care About Sustainability

### The hard data

This cohort accounts for approximately 23% of the total Australian population.

They know sustainability best. They are the most educated about it, it's more top-of-mind, they are more likely to notice and remember campaigns about sustainability, and to influence others.

They are also most sceptical of brands who are talking about sustainability, making them a difficult cohort for the average brand to win over. Instead, they are typically a target for brands where sustainability is the brand's DNA, like Patagonia. These brands have more credibility than mainstream brands who have recently adopted sustainable practices.

Brands that can confidently meet this cohort's expectations should strongly consider targeting them, as they influence the conversation on sustainability and are most likely to advocate for your brand.

### The Basics

**Male : Female**  
43:57 ix87:113

**Employed Full-Time**  
43% ix96

**Married or De Facto**  
59% ix103

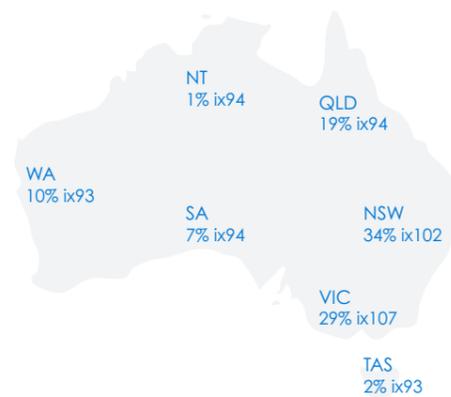
**Speak language other than English**  
25% ix103

**LGBTIQA+**  
ix106 + bisexual ix105

**University Educated**  
42% ix106

**Live with partner + kids**  
34% ix104

**Metro: Regional**  
67% ix100: 33% ix100



### Attitudes & Interests

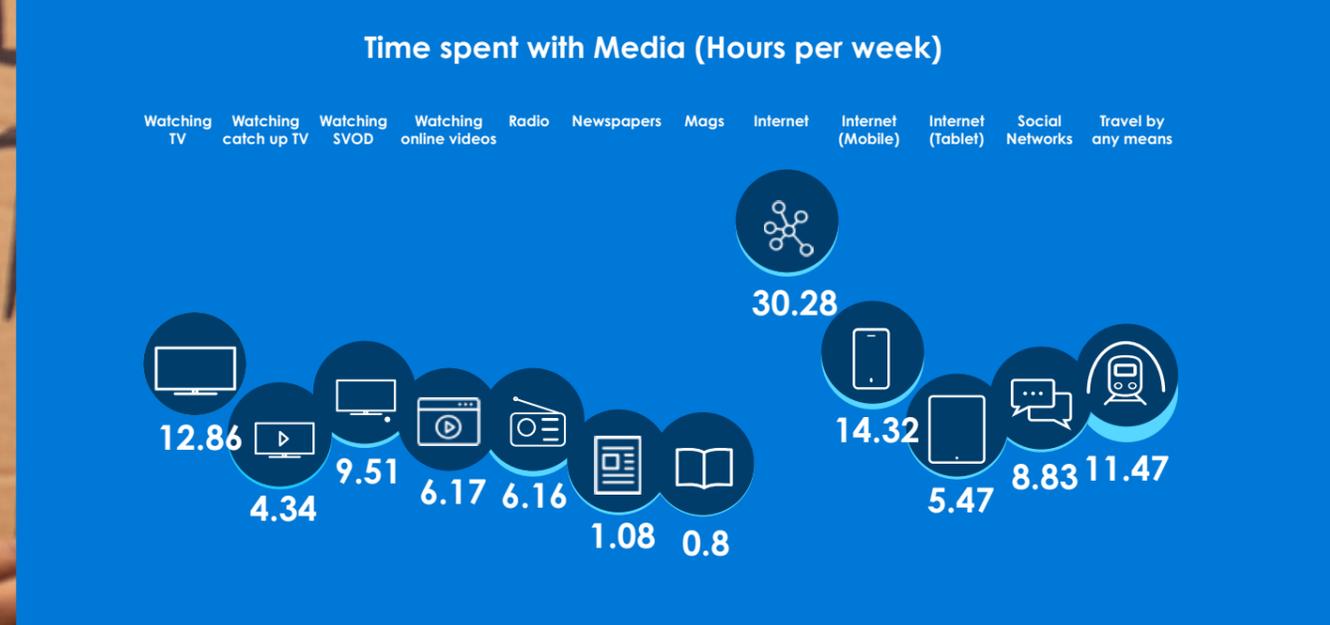
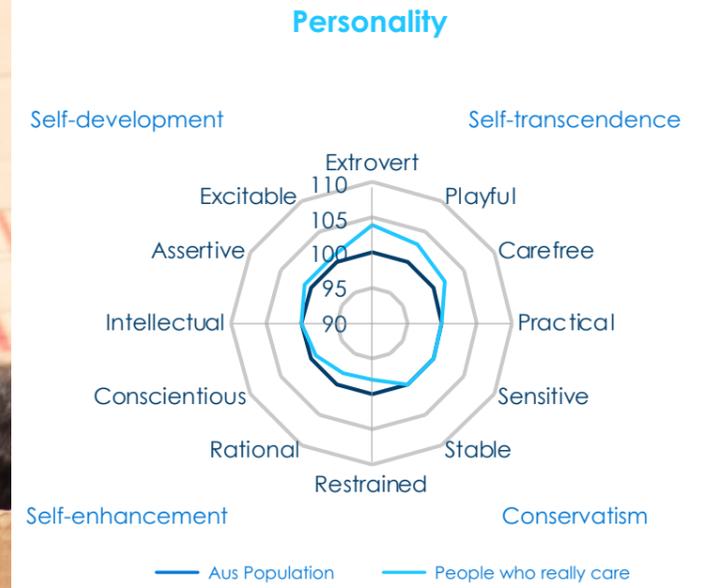
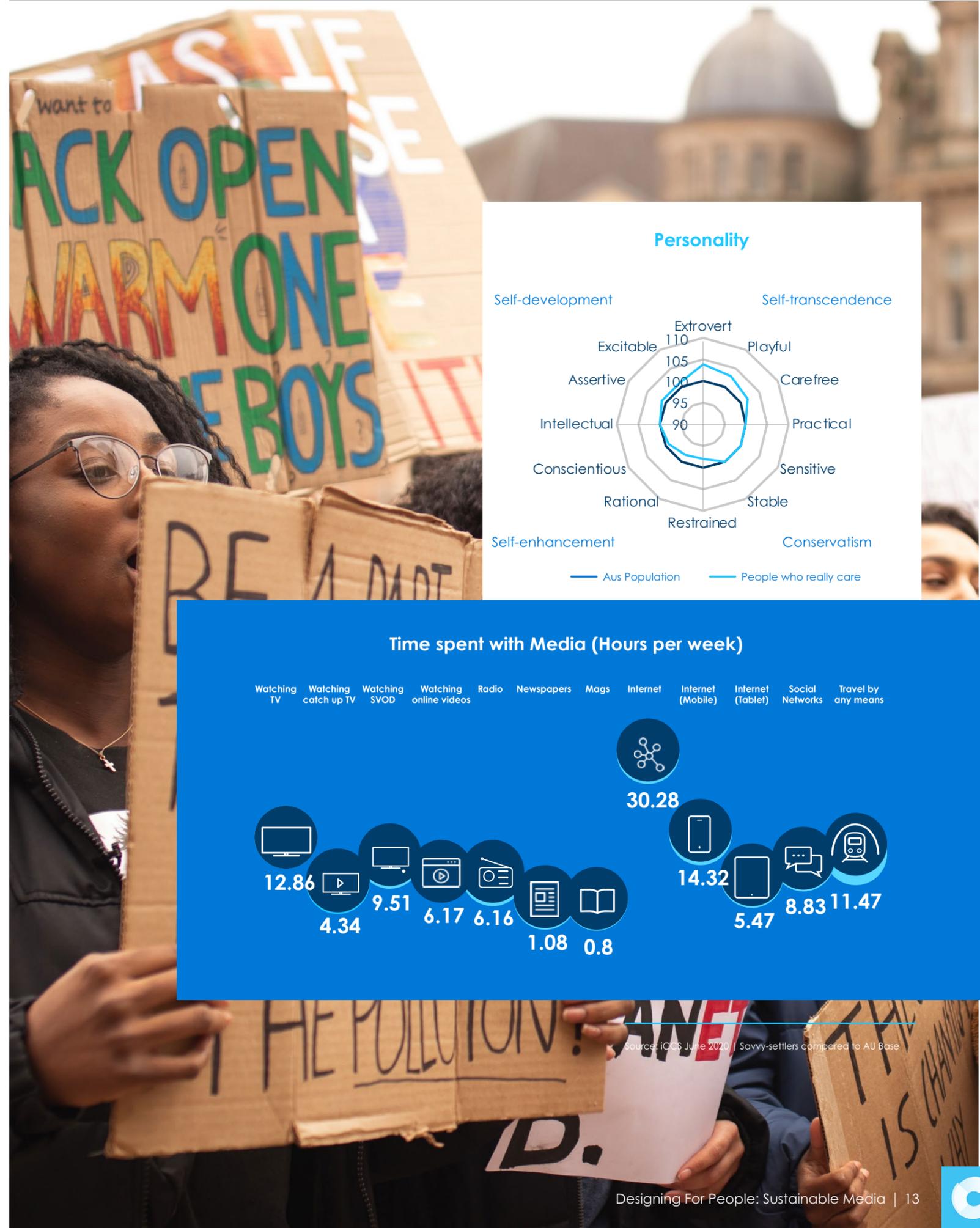
'Companies should do more to prevent climate change' 81% ix131

'The cultural movements on social media (e.g. #BlackLivesMatter, #MeToo) have a positive effect on society' 60% ix148

'It is important to me that companies provide info about how their products are made' 75% ix141

'I am actively involved in local community issues' 39% ix148

'I am cynical about companies who say their products/services protect the environment' 61% ix122



Source: ICCS June 2020 | Savvy-settlers compared to AU Base



## People Who Care

### The hard data

This cohort accounts for approximately 43% of the total Australian population.

This is the biggest cohort, and the safest target for most sustainability campaigns. They won't necessarily be actively looking for brands that are campaigning about sustainability, but they will respond well to brands that do get their attention.

Brands who are starting to speak about sustainability for the first time should target this audience first to start building positive brand perceptions.

### The Basics

 **Male : Female**  
48:52 ix97:103

 **Married or De Facto**  
9% ix103

 **LGBTIQA+**  
ix98 + bisexual ix98

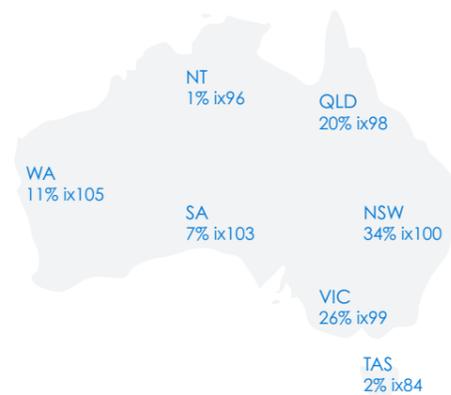
 **Live with partner + kids**  
34% ix103

 **Employed Full-Time**  
46% ix103

 **Speak language other than English**  
24% ix100

 **University Educated**  
41% ix103

 **Metro: Regional**  
168% ix102: 32% ix96



### Attitudes & Interests

'Companies should do more to prevent climate change' 78% ix114

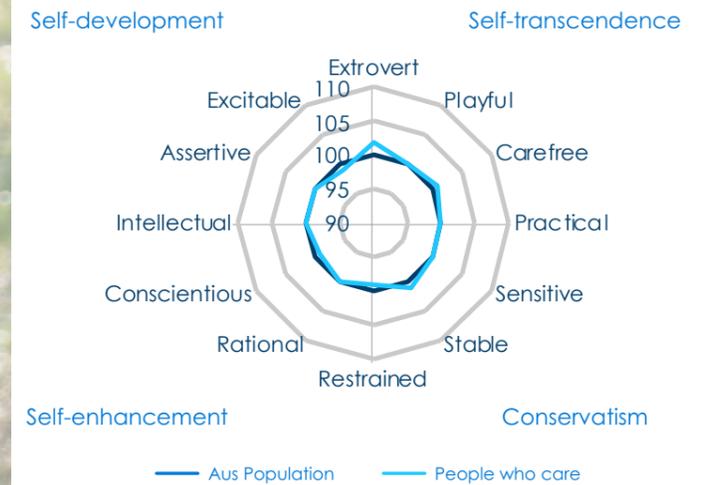
'It is important to me that companies provide info about how their products are made' 58% ix109

'I am cynical about companies who say their products/services protect the environment' 54% ix108

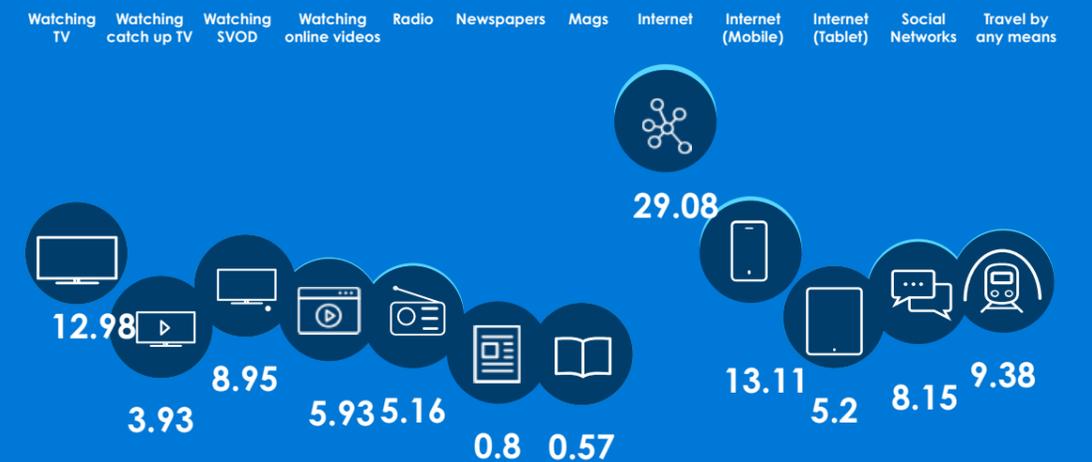
'The cultural movements on social media (e.g. #BlackLivesMatter, #MeToo) have a positive effect on society' 44% ix109

'I am actively involved in local community issues' 27% ix102

### Personality



### Time spent with Media (Hours per week)



Source: ICCS June 2020 | Savvy-settlers compared to All Adults



## People Who Are Neutral

### The hard data

This cohort accounts for approximately 23% of the total Australian population.

This is a challenging cohort to win because sustainability is not on their radar.

Not only do brands need to get their attention, but they also need to convince this cohort that sustainability is important – no mean feat, given that sustainability has featured prominently in the public consciousness for decades now. This cohort have already had lots of opportunities to realise its importance.

Nevertheless, this cohort is best for brands who have already won over the 'People Who Care' cohort and are looking to create a broader impact.

### The Basics

**Male : Female**  
52:48 ix106:94

**Married or De Facto**  
54% ix94

**LGBTIQA+**  
ix97 + **bisexual ix98**

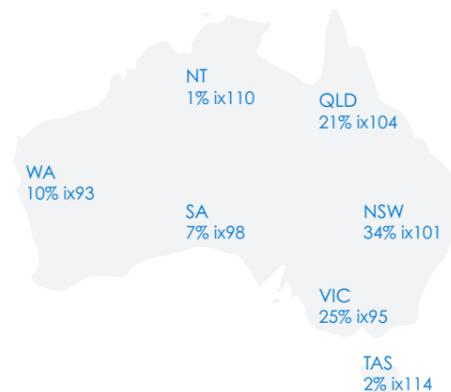
**Live with partner + kids**  
31% ix94

**Employed Full-Time**  
43% ix94

**Speak language other than English**  
25% ix102

**University Educated**  
37% ix94

**Metro: Regional**  
65% ix97: 35% ix105



### Attitudes & Interests

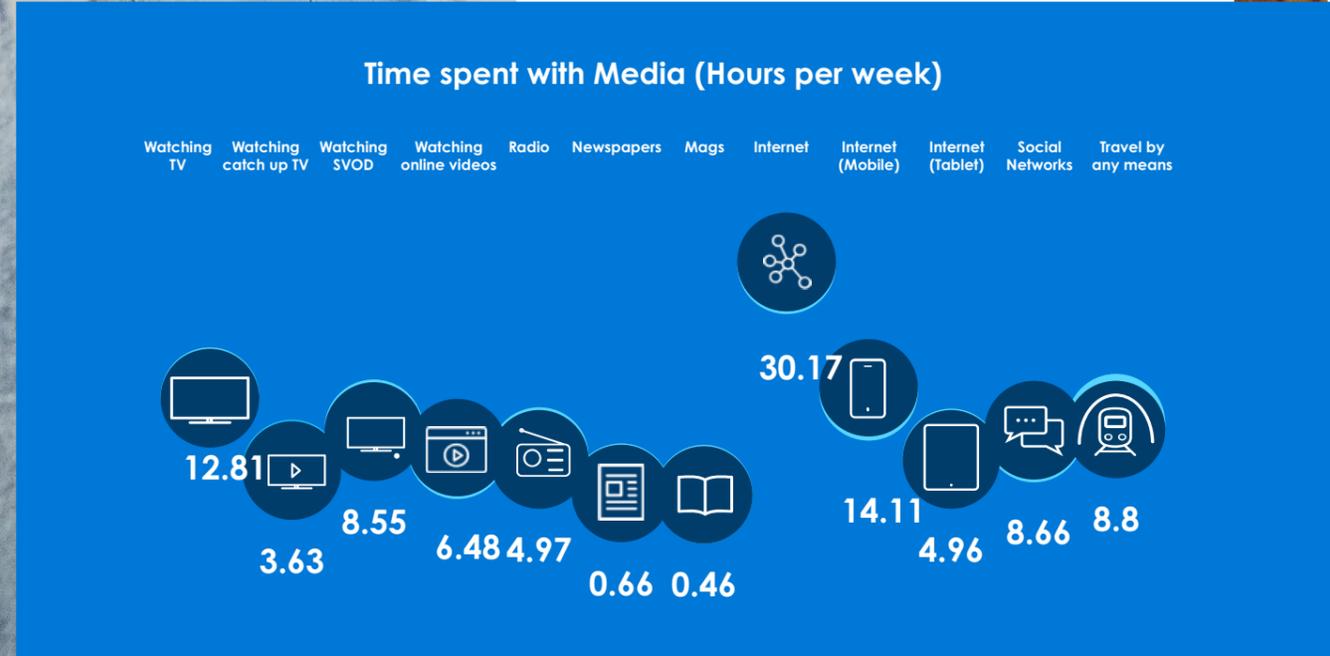
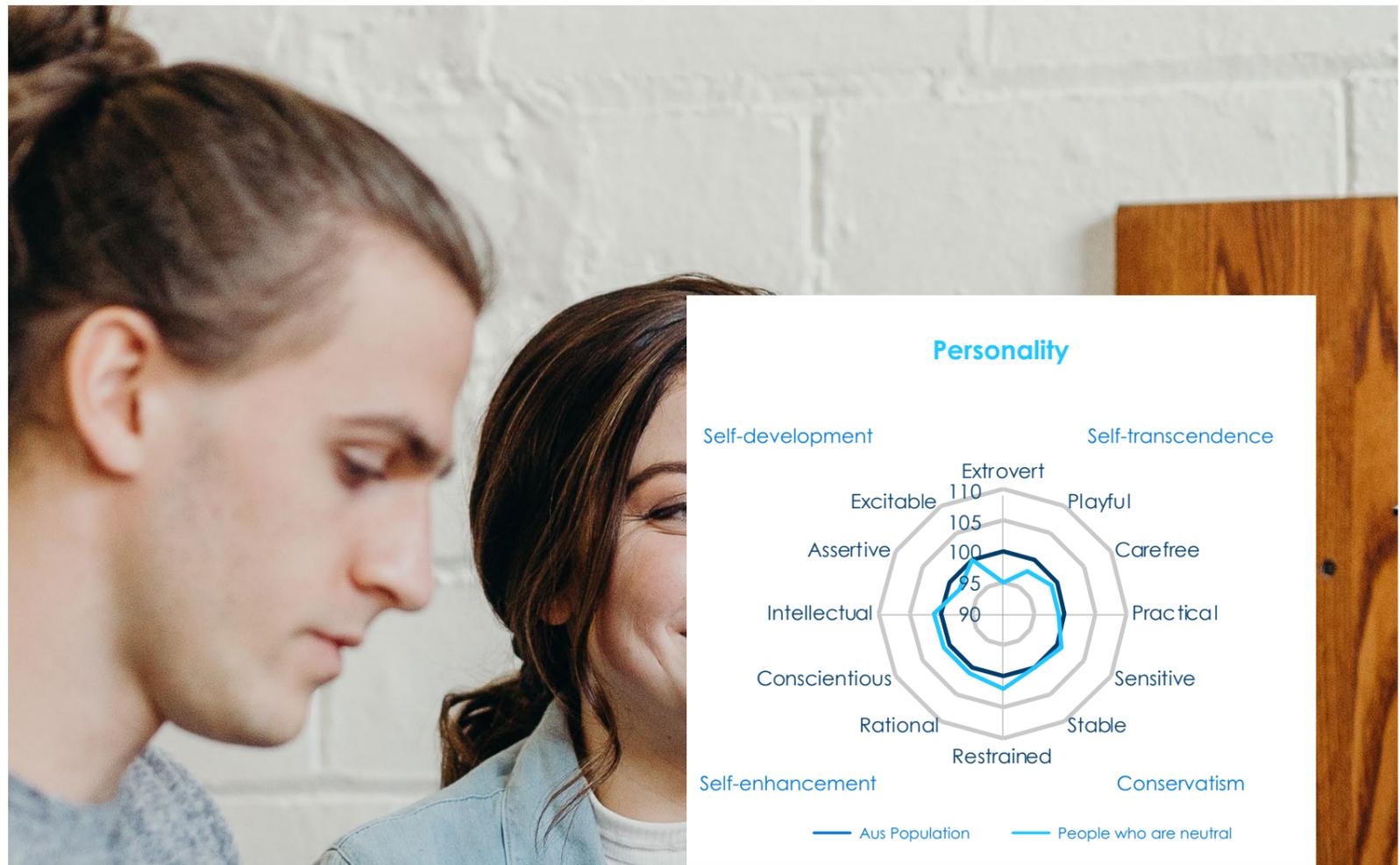
'Companies should do more to prevent climate change' 47% ix69

'It is important to me that companies provide info about how their products are made' 36% ix68

'I am cynical about companies who say their products/services protect the environment' 35% ix70

'The cultural movements on social media (e.g. #BlackLivesMatter, #MeToo) have a positive effect on society' 25% ix63

'I am actively involved in local community issues' 19% ix70



Source: ICCS June 2020 | Savvy-settlers compared to AU Base



## People Who Don't Care

### The hard data

This cohort accounts for approximately 11% of the total Australian population.

You would be hard-pressed to find a campaign that specifically targets this cohort. It only accounts for a small segment, and they are very unlikely to respond in any meaningful way to communications about sustainability.

They should be reserved as a target audience brands who are especially ambitious when it comes to driving sustainable behaviour change.

### The Basics

**Male : Female**  
61:39 ix125:76

**Married or De Facto**  
57% ix98

**LGBTIQA+**  
ix102 + bisexual ix99

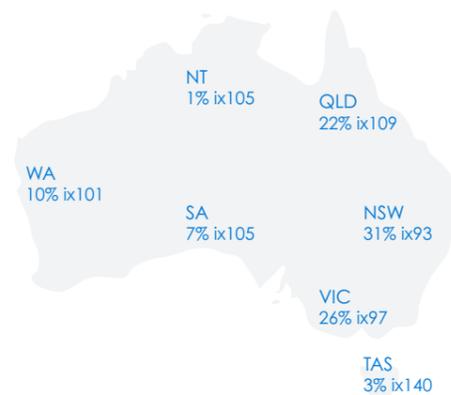
**Live with partner + kids**  
31% ix94

**Employed Full-Time**  
44% ix100

**Speak language other than English**  
22% ix93

**University Educated**  
35% ix90

**Metro: Regional**  
65% ix98: 35% ix105



### Attitudes & Interests

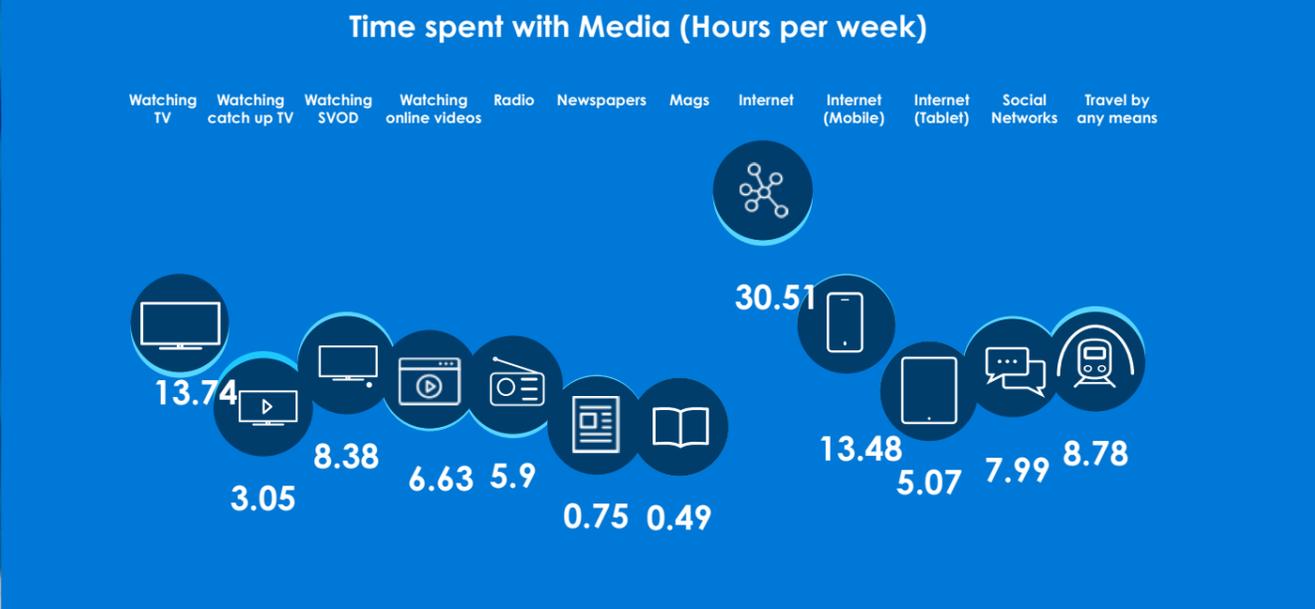
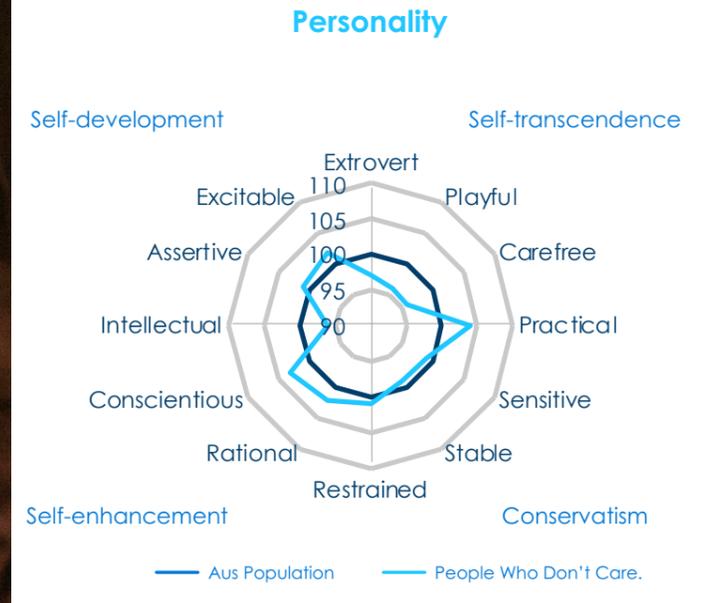
'Companies should do more to prevent climate change' 34% ix51

'It is important to me that companies provide info about how their products are made' 29% ix54

'I am cynical about companies who say their products/services protect the environment' 44% ix89

'The cultural movements on social media (e.g. #BlackLivesMatter, #MeToo) have a positive effect on society' 20% ix49

'I am actively involved in local community issues' 16% ix60



Source: ICCS June 2020 | Savvy-settlers compared to AU Base





## Principles For Marketers

In this final section we have translated our people insights into actionable principles for marketers.

Each principle is accompanied by case studies from brands around the world that are executing each principle best.

What this whitepaper suggests is that the principles which underpin sustainable marketing are very similar to those that underpin best practice for traditional marketing. These principles include a carefully selected audience; simple messaging; an easy user experience; a distinctive approach; relevant media; and media that reflects the message it carries.

However, there are nuances specific to sustainability that are demonstrated well in the case studies that follow.



# 01.

## Carefully select your target audience

Every sustainability campaign is different. In most cases, the 'People Who Care' cohort will be most receptive to your media and offer the most volume, but in some cases a different audience might be better suited to your objectives.

**Arla** wanted to influence 'People Who Are Neutral' about sustainability, so it created an AR game ('Recycling Buddies') on the pack of its Luonto+ yoghurt for kids, based on the insight that Finnish children were often the ones to prompt their household to recycle more (Source: dentsu).

**Patagonia** launched a new range of sustainable food, including tinned fish, snacks, dried meats, honey, and alcohol. It created a printed journal and detailed website, both featuring trusted personalities, to reach People Who Really Care About Sustainability. The brand also appeals to this audience with its boycott of paid Facebook advertising, because (as per a press release) the platform continues to spread "misinformation about climate change"

Source: Patagonia, Twitter

Image Source: xxx

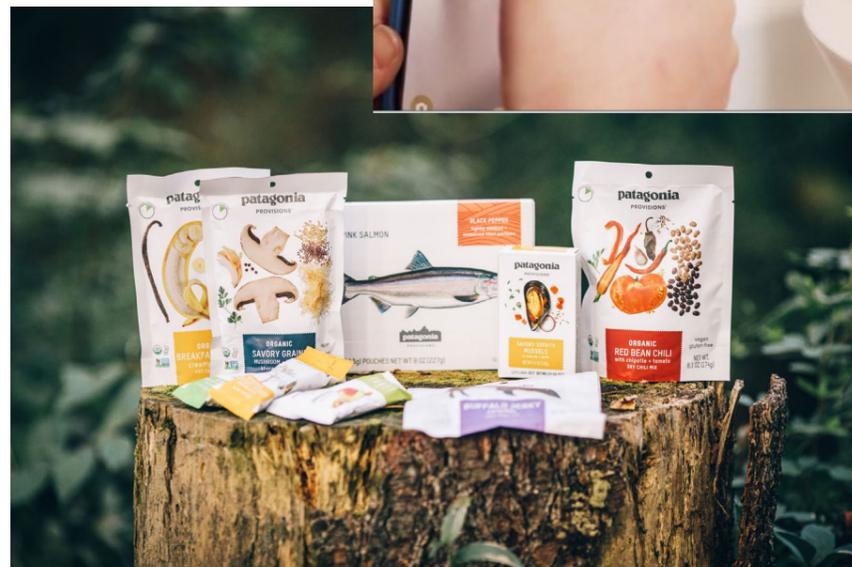


Image Source: [https://bikepacking.com/wp-content/uploads/2020/07/Patagonia-Provisions-review\\_0.jpg](https://bikepacking.com/wp-content/uploads/2020/07/Patagonia-Provisions-review_0.jpg)



Image Source: xxx



Image Source: xxx

# 02.

## Simplify your sustainable message with media

Sustainability can be very complex to communicate, and media can play a crucial role in building trust and changing behaviour.

**Carlsberg** made a special glue to connect cans of beer, reducing packaging by 76%. It communicated this with an [education campaign](#) in video and digital channels to demonstrate how the packs work.

**IKEA** announced a plant-based version of their famous Swedish meatballs, with an exhaustive content campaign in owned and earned media, featuring recipe inspiration and behind-the-scenes storytelling.

Source: WARC, Carlsberg Group, dentsu, IKEA, Delicious



### 03.

## Make it easy for people to take sustainable action

People are creatures of habit, so it can be difficult to start new, sustainable behaviours. Brands can make the process easier by using media in innovative ways.

**Lacoste** included pre-paid postage labels in its eCommerce deliveries, so shoppers could donate their old clothes in the same box, for free.

**Heineken** created a green energy program that made it easy for their B2B customers in Brasil (bars and restaurants) to switch to renewable energy. The venues could join the program on the Heineken website and reduce their energy bills by up to 40%.

Source: Contagious, D&AD



Image Source: <https://content.presspage.com/uploads/2547/greenenergy.png?10000>



Image Source: <https://officiel.imgix.net/production/middleeast/images/1620295819719065-KSA-LACOSTE-Give-For-Good-x-Kiswa.png?w=1900&fit=crop&crop=faces&auto=%5B%22format%22%2C%20%22compress%22%5D&cs=srgb>



Image Source: <https://pmlgroup-ni.com/wp-content/uploads/2018/08/Corona3.jpg>



Image Source: xxx

### 04.

## Focus on one distinctive aspect of sustainability

Choosing a specific cause to get behind is an ambitious but powerful way for brands to become famous for their sustainability actions. Distinctiveness and consistency are crucial, as they are for any marketing activities.

**Carrefour** created the 'Black Supermarket' to protest EU laws which restricted the types of seeds could be used to grow produce – laws that protected the agro-chemical industry at the cost of farmers, biodiversity and food quality. Carrefour began selling illegal produce in many of its stores, ran advertising, organised a petition, and successfully lobbied to change the law.

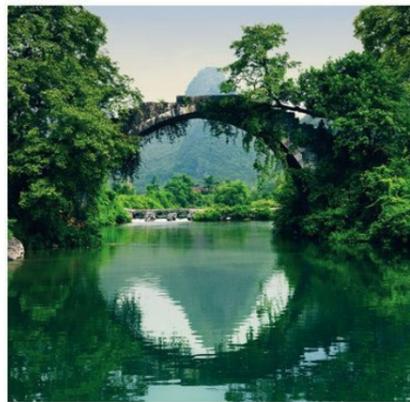
**Corona** has become famous for its campaigns about ocean pollution, including sculptures made of plastic waste, its 'Pay with Plastic' campaign, and an app that enables users to calculate their own plastic footprint.

Source: WARC, D&AD, Marketing Dive, Contagious





Image Source: <https://marcasmais.com.br/wp-content/uploads/2020/09/colorado-amazonia.jpg>



Guilin, China: 1072 Euros



Kromlau, Germany: 19 Euros

Image Source: [https://4c448342d6996fb20913fd1f9dc15ff616aa7fa94219cb721c9c.ssl.cf3.rackcdn.com/e4/82/455874\\_8e108dfc5ef243d88de6e40d740029a0.jpg](https://4c448342d6996fb20913fd1f9dc15ff616aa7fa94219cb721c9c.ssl.cf3.rackcdn.com/e4/82/455874_8e108dfc5ef243d88de6e40d740029a0.jpg)



## 05.

### Make sustainability relevant

New media technologies, like dynamic advertising, allow brands to bring sustainable messages to life for audiences in relevant, provocative ways.

**German Rail** launched a social media campaign that compared local German tourist destinations with popular overseas ones. The ads showed how much less it would cost (in CO2 and in Euros) to travel by train to the local destination, with real-time data based on the viewer's location.

**Cervejaria Colorado** (a Brazilian brewer) launched a new beer that changed price every week in accordance with Brasil's deforestation rates: the healthier the rainforest, the cheaper the beer. The live mechanism was promoted in digital media, and profits were donated to local community and conservation groups.

Source: WARC, Contagious

## 06.

### Remember that the medium is the message

A sustainable message told through sustainable media is far more likely to be believed – and 84% of people claim that they would be more likely to buy from a company which practices sustainable media advertising<sup>11</sup>.

There are many emerging media formats that brands can test and integrate into their mix. Agencies and publishers are also developing new technologies to show advertisers the carbon impact of their media investment and give them the option to offset it.

**JOLT** is an Australian company that owns electric vehicle charging stations with digital advertising screens. Brands like Telstra have used these screens to reach sustainably-minded audiences when they run messaging about sustainability, and traditional campaigns too.

**Volkswagen** used pollution-eating paint on murals to launch its new electric vehicle, the 'ID 3'.

**Dole** (a fruit and vegetable company) ran ads on rubbish trucks and bin bags featuring facts about food waste and food poverty in New York and other American cities. These ads were supported by paid digital and social content that explained Dole's own waste-prevention promises.

**Polestar** Electric Cars used minimal ink in their full-page newspaper ads to express their 'Maximal Experience, Minimal Impact' proposition. Ads feature a QR code for readers to discover more.

**Dentsu** and Bristol University have created a web-based tool called 'DIMPACT' that calculates greenhouse gas emissions caused by digital media, from the point content production to the end user's device. It is being trialled and scaled in 2022 for advertisers who want to offset the impact of their media investment.

**The Guardian** has banned fossil fuel advertising, excludes fossil fuels from its investment portfolio, and has pledged to reduce its emissions to net zero by 2030. It regularly publishes content about the climate crisis "with expertise and urgency", positioning itself as a relevant context for brands with the same values.

Source: <sup>11</sup>dentsu & Microsoft, The Rise of Sustainable Media, InHabitat, Mi-3, AFR, Sydney Morning Herald, Contagious, dentsu, The Guardian

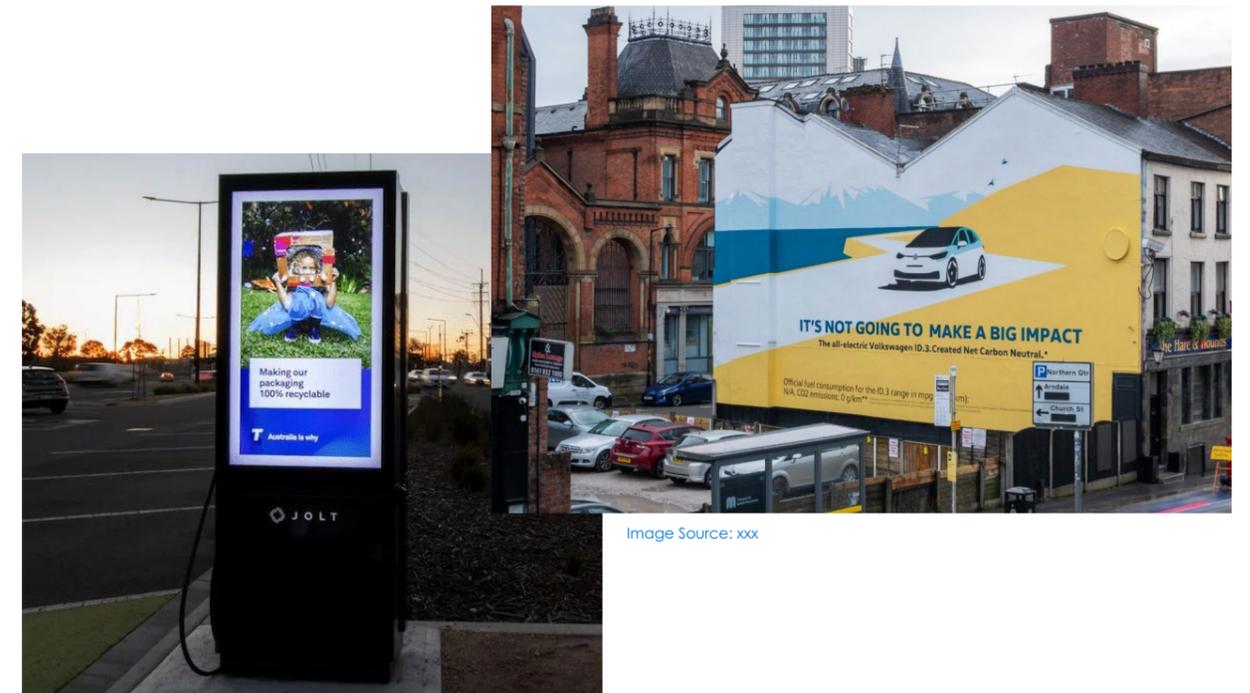


Image Source: xxx

Image Source: <https://images.carexpert.com.au/app/uploads/2021/08/JOLT.jpg>



## Where to from here?

Across Carat and dentsu, we have many products and services that can help your brand overcome the barriers to communicating sustainability in an effective manner.

### dentsu

Data Consciousness Project

Understand how this audience feels about sharing their data.



Understand how you can build trust with this audience.

### dentsu intelligence

Identify who the most valuable Boomers are for your brand.

### CARAT strategy

Design experiences that earn their attention and deliver results.

### the story lab

Amplify your brand story by connecting with media partners and influential voices in culture.

### dentsu programmatic

Identify how you can reach this audience with precision.

## Chat to us

For further information please contact:

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