

RESPONSIBLE  
MEDIA  
FORUM

PARTNERING  
FOR A SUSTAINABLE  
SECTOR

**“With great power  
comes great  
responsibility”**



# THE SUPERPOWER OF MEDIA

MIRRORS OR MOVERS II:  
MANAGING THE SOCIETAL IMPACTS  
OF CONTENT

# CONTENTS

<b>Foreword</b>	<b>03</b>
<b>Summary</b>	<b>04</b>
<b>Media impacts: Direct and indirect</b>	<b>07</b>
<b>Setting the context</b>	<b>10</b>
<b>The state of play for content impact management today</b>	<b>19</b>
<b>Challengers</b>	<b>27</b>
<b>Understanding and measuring influence</b>	<b>30</b>
<b>Where next?</b>	<b>35</b>

# FOREWORD



## **The Time is Now.**

When it comes to climate change, the science is done. The politics is done. There will be ongoing questioning; there will be other crises to handle; there will be scrutiny of plans; there will be legal setbacks – that is all to be expected in the course of the greatest transformation of our time.

As we prepare to beat climate change, what has yet to be ‘done’ is a culture of climate optimism; the belief that the world will be better, the confidence that we can make it, the recognition that the action required is urgent, exciting, necessary and full of opportunity. Culture is just as important as science and politics, but neither scientists nor politicians are in a strong position to define it. Scientific reports and political manifestos set out the long-term direction, not the motivation and excitement we need here and now.

The media sector – in all its glorious forms and formats – has a proud history of tackling society’s darkest moments head on; slavery, suffrage and civil rights to name just a few. What if we could use the inherent cultural power of media content to solve the defining challenge of our time?

The 2015 Paris climate agreement represents the integrity of human spirit. Despite its ambitious goal of reaching a global economy of net zero emissions by 2050, we are currently witnessing a gap between current efforts and actual requirements: between our greenhouse gas emissions and the planet’s tolerance for those emissions. Politicians and climate scientists alike refer to this as the emissions gap.

I prefer to think of it as a culture gap. A gap between what we are doing, and what is possible and in fact necessary, on the other. No industry is better positioned to close this gap than the media sector.

Even as we place absolutely vital energies into handling another crisis – a public health emergency that threatens millions of lives across the globe – we must not lose momentum on the climate emergency, which also threatens a vast swathe of humanity. The response to Covid-19 surely demonstrates the ability people have to come together in times of need; we must continue to apply this energy to our ongoing battle for our environment.

Mirrors or Movers II is a status report and a call to arms. It shows what media companies have done and can further do to utilise their unique influence in a way that benefits society as well as shareholders. Together, we can inspire more enlightened behaviours, amplify the stories that need to be told, question business as usual, campaign for change and, finally, normalise sustainable living.

We are entering the most critical decade of human existence. By the end of the ‘20s we will have largely decided the quality of life on this planet for centuries to come. **There has never been a more urgent need for the superpower of media companies. The time to use it is now.**

## **Christiana Figueres**

Founding Partner, Global Optimism and Former Executive Secretary of the United Nations Framework Convention on Climate Change (2010-2016)

@CFigueres

# SUMMARY

In our 2013 report, 'Mirrors or Movers? Framing the debate about the impact of media content', we explored a central question: "Should the media sector actively seek to shape public debate, change behaviours and promote sustainable lifestyles as its contribution to social responsibility?"

This is the sequel to 'Mirrors or Movers'. We spoke with industry representatives, academics and commentators to understand their perspectives on the question, and to enable us to develop a framework and structure for the debate today.

In the 2013 report, we:

- Defined six 'impact modes' through which media moves society.
- Provided case studies demonstrating how media impacts are achieved, managed and measured.
- Explored the role of media in actively driving impacts through content, including pitfalls and rewards.
- Laid out the many challenges that exist in measuring content impacts.
- Opened up the debate around several key questions – from the ideological and philosophical to the practical – detailing the views expressed by various informed experts consulted as part of our research.

In this 2020 update, we explore what has changed since 2013, through the lens of a few key questions:

- Has the influence of media content, and the expectations on media companies, changed since 2013?
- How are media companies actively managing content impacts today, and how has this changed?
- Do the six influence modes still stand up, and are there any new tools, frameworks or initiatives being used to understand and measure content impacts?

**Section 1 contrasts the media sector's limited direct impacts**, when compared to more natural resource-intensive sectors such as extractives, while exploring media's potentially vast indirect impact. The opportunity for media companies to culturally influence societies is what sets them apart.

**Section 2 sets the context**, evaluating how major sectoral developments have changed approaches to responsibility; how shifting pressures on media companies have influenced their approaches to responsibility.

**Section 3 reviews the impacts of content today**, through interviews with media sustainability professionals and case studies. Content impacts are on the agenda of internal and external stakeholders; the sustainability function has become more interconnected with other teams and the organisation's purpose; the next big questions to answer are around partnerships, selecting meaningful issues for focus, and measurement.

**Section 4 passes on the microphone to external commentators, who deliver constructive challenges to the media sector.** The bottom line: as society changes, media needs to change with it, ensuring its purpose is fit for the new challenges ahead.

**Section 5 summarises work to date on understanding and measuring influence**, reviewing progress made since 2013 on certain approaches and metrics while recognising the challenge ahead to further roll this out, over topic areas, across sub-sectors, and throughout the industry.

**Section 6 asks: where next? It outlines six steps to creating impactful content:** set the intent; ensure diversity in content makers; know the value of expertise; partner strategically; measure impact; and follow up on impact.

“

**SHOULD THE MEDIA SECTOR  
ACTIVELY SEEK TO SHAPE PUBLIC  
DEBATE, CHANGE BEHAVIOURS AND  
PROMOTE SUSTAINABLE LIFESTYLES  
AS ITS CONTRIBUTION TO SOCIAL  
RESPONSIBILITY?**

”

Responsible Media Forum  
2013

This report was researched and written by  
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Partners Ltd**

Produced by Responsible Media Forum and Carnstone Partners Ltd  
**Designed by Dentsu Aegis Network**



Established formally in 2003, the Responsible Media Forum is a partnership between 25 leading media companies to identify and take action on the social and environmental challenges facing the sector. Starting as a UK initiative, participants now come from all over the world covering the full industry spectrum, from advertising to scientific publishing. We work on the principle that CR in a media company has many features that set it apart from other sectors. The Responsible Media Forum is a multi-client project run and chaired by Carnstone Partners Ltd.

[www.responsiblemediaforum.org](http://www.responsiblemediaforum.org)



Carnstone is a specialised management consultancy working globally at the intersection of sustainability and business strategy. Rooted in a sound technical and commercial understanding, we provide advice and support to large companies, international organisations and NGOs from offices in London and Shanghai. Carnstone works with around a fifth of the FTSE 100. We have been directly involved in corporate responsibility work with 10 media companies, advising on strategy development, community engagement, environmental management and reporting.

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# MEDIA IMPACTS: DIRECT AND INDIRECT

Back in 2013, we said that media companies would be well advised to get their own house in order before pronouncing externally on social and environmental issues. Indeed, the media sector has a good track record of measuring and managing its direct operational impacts. Since the 2013 report, there have also been examples of media companies working to understand and actively manage their environmental impacts across the digital value chain. For example, DIMPACT is a new collaboration between computer science researchers from the University of Bristol working with sustainability and technology teams at the BBC, Dentsu Aegis Network, Informa, ITV, Pearson, RELX, Schibsted, Sky and TalkTalk, initiated and coordinated by Carnstone. (see Exhibit 1).

## In-house

The **Science-Based Targets Initiative** drives and enables companies to set climate targets in line with science. Alma Media, Bertelsmann, Dentsu, Informa, Pearson and Sky have set science-based targets.

Second Hand Effect aims to encourage sustainable lifestyles, and is founded on an environmental calculator developed and launched by **Schibsted**. This tool evaluates the positive environmental impact derived from Schibsted's digital marketplaces in Europe and Latin America.

**Sky** committed to go completely single-use plastic free by 2020. In 2018, they removed 175 tonnes of single-use plastic, and removed single-use plastics from all new products.

**Virgin Media's** #workwithme campaign, aims to get 1m disabled people into the workplace. In-house, a new employee disability awareness module, dyslexia font, and buildings accessibility standard contribute to progress.

## Sector initiatives

**Albert** is a UK film and TV industry initiative to eliminate waste and carbon emissions from production. In 2020, in partnership with Fremantle, the initiative is going global, allowing the international production community to track their carbon emissions.

**Planet placement** (an Albert initiative) provides inspiration and practical guidance to creatives on embedding environmental messaging into programming. Because "the greatest opportunity to make an impact is through the content we put on screen".

**Project Diamond** is a diversity data-gathering initiative for the UK TV industry, launched by the Creative Diversity Network (CDN) in 2017. Diamond gathers diversity 'monitoring' data for both people appearing on-screen and the employees that create content off-screen, giving a detailed picture of who makes and contributes to the nation's TV. Data is published on an annual basis, showing change year-on-year.

Exhibit 1: Selected examples of Responsible Media Forum and wider sector programmes to manage direct impacts since 2013

Since the 2013 report, there have also been examples of media companies working to understand and actively manage environmental impacts across the digital value chain. For example, DIMPACT is a new collaboration between computer science researchers from the University of Bristol working with sustainability and technology teams at the BBC, Dentsu Aegis Network, Informa, ITV, Pearson, RELX, Schibsted, Sky and TalkTalk, initiated and coordinated by Carnstone. The project will map the 'downstream' carbon hotspots of digital media content and services. The project aims to create an online carbon calculator, DIMPACT, available to any company offering digital products and services.

In 'Mirrors or Movers' 2013, and again in our 2017 report – 'The Future of Responsible Media' - we compared the direct environmental impacts of media and extractive companies. The latter chosen for its known environmental impacts and the significant external pressure it's under as a result. The analysis showed two sectors, comparable in size – both in terms of revenue and employees – but leagues apart in environmental impacts.

This year, we re-ran the analysis. We compared the world's 10 largest technology, media and telecoms (TMT) companies by revenue with the 10 largest extractive companies according to the Forbes Global 2000, which measures size through a combination of revenue, profits, assets, and market value<sup>1</sup>. The gap between the two sectors is less dramatic than it has been in previous iterations of this analysis, primarily because we have included asset-heavy technology and telecoms companies rather than just media companies. Nevertheless, it is still fair to say that in direct terms the media sector is a lightweight on climate change compared with industrial peers.

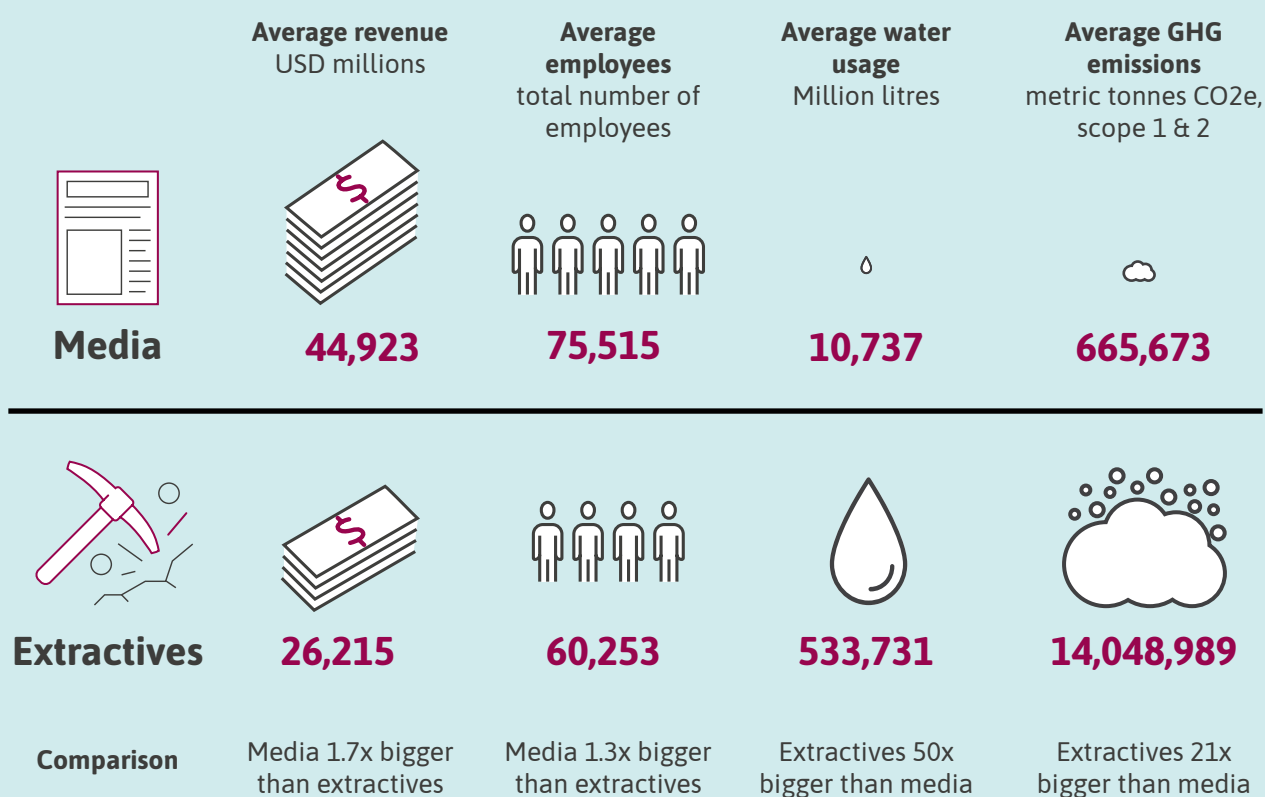


Exhibit 2: Comparison between media and extractives sectors by size and environmental intensity

While the media is significantly larger in terms of revenues and number of employees, its environmental impacts are dwarfed by those of the extractive sector. For every litre of water used by a media company, their extractive peer would use 50 litres; for every tonne of greenhouse gas (GHG) emitted by a TMT company, an extractive company would emit 21 tonnes.

<sup>1</sup>The media companies were (in order of size): Alphabet, The Walt Disney Company, Comcast, Twenty-First Century Fox, Facebook, Bertelsmann, Viacom, CBS, Baidu and News Corp. The extractive companies were (in order of size): Glencore, BHP Group, Rio Tinto, China Shenhua Energy, Anglo American, Freeport-McMoRan, Norilsk Nickel, Coal India, Grupo Mexico, and Teck Resources. Due to unavailability of data in some cases, we compared averages per sector rather than cumulative figures.

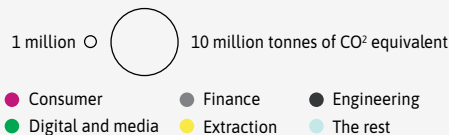


Another way to look at this is through the carbon emissions of the FTSE 100 – the 100 biggest companies by market capitalisation listed on the London Stock Exchange. You can see this group of companies depicted in the diagram on the right (Exhibit 3), scaled by carbon emissions and colour-coded by industry<sup>2</sup>. Can you spot the green dots? Neither can we. Whereas, when we look to quantifiable ‘brainprints’ attributed to specific pieces of media content, the impacts (though challenging to accurately measure) appear to be unequivocally enormous (see exhibit 4).

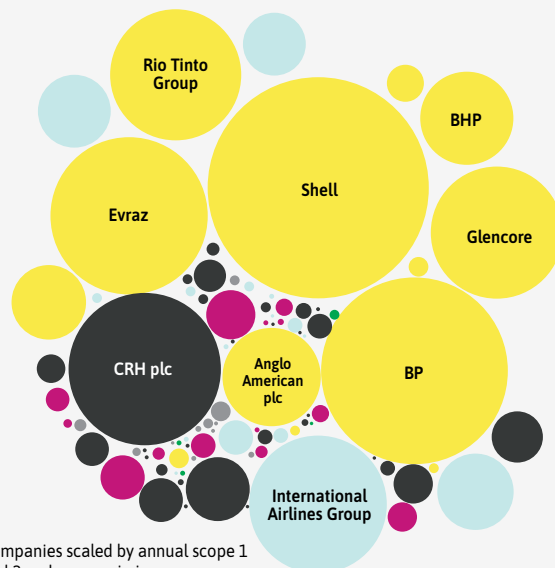
Pointing out this asymmetry, we are not suggesting that media companies shouldn’t bother with improving their direct environmental impacts, nor saying that there is no more work to be done in this area. The Paris Agreement is clear and unequivocal: all who emit carbon need to reduce their emissions. The sooner, the better. We are simply drawing attention to the point that the media industry’s sustainability potential resides elsewhere.

It is our contention that the ratios above are reversed when it comes to cultural impact. As Christiana Figueres so elegantly put in the foreword, no industry is better positioned than media to affect and influence culture, to change beliefs and to drive behaviours. Cultural impact is the media sector’s superpower.

## The FTSE 100: Carbon Footprint



## The FTSE 100

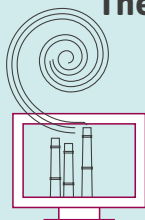


Companies scaled by annual scope 1 and 2 carbon emissions

Exhibit 3: FTSE100 companies by direct environmental footprint.

## Examples

### The carbon footprint of media



**13.5 tonnes**  
tonnes carbon produced/  
hour of television<sup>3</sup>



**101 tonnes**  
CO<sub>2</sub> produced by Guardian  
News & Media on a daily  
basis<sup>5</sup>



**93,781 tonnes**  
carbon emitted by RELX’s  
entire operations over the  
course of the year

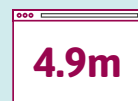


Sky has been carbon neutral  
since 2006, aiming for net  
zero by 2030

### The brainprint of media



viewers of Blue Planet with **62%**  
of viewers surveyed intending  
to change their behaviour after  
seeing the programme<sup>4</sup>



Website visits and **221,000**  
signatories for The Guardian’s  
#keepitintheground campaign<sup>6</sup>



RELX represents **63%** of total  
citations in all academic  
journals and publication in the  
environmental science market,  
and **49%** in energy and fuels<sup>7</sup>



Sky Ocean Rescue reached  
**47.1m** people, with **8m** saying  
they’ve changed the ways they  
use at least one single-use  
plastic item as a result<sup>8</sup>

Exhibit 4: The carbon footprint vs brainprint of media companies

<sup>2</sup>Tortoise Media (2020), ([‘Responsibility 100 Index: Good companies need to be good citizens too – it’s time for action’](#))

<sup>3</sup>HM: Albert & Freemantle (2020) ([A Global Carbon Calculator is coming!](#))

<sup>4</sup>Based on research conducted by BBC’s Audience Impact team

<sup>5</sup>HM: 36,896 tonnes of carbon on an annual basis, apportioned across 365 days. ([Guardian News & Media \(2015\)](#), ([Sustainability Report 2015](#)))

<sup>6</sup>Keep it in the ground statistics provided by Alan Rusbridger, former Editor-in-Chief, The Guardian

<sup>7</sup>HM: RELX Group (2019), ([Corporate Responsibility Report 2019](#), p.65.)

<sup>8</sup>Statistics provided by the Sky Inspirational Business team

# SETTING THE CONTEXT

In the last section we showed that the sector's direct impacts are dwarfed by its cultural impact 'superpower'. In this and following sections, we'll explore how the sector flexes its biggest impact muscle, and how the landscape, expectations and practices have changed.

Media has long taken an active role in shaping national and international conversation, culture and politics – whether putting across the latest health science, or promoting a political candidate or party. Today, with the proliferation of digital media, the brainprint has been somewhat democratised, enabling just about anyone (and not just experts and those in positions of power) to get their views across on a mass scale.

Rather than recap the long history of media influence and its role in society (an interesting but lengthy endeavour), in this section we focus on how the debate – and expectations on media companies – has moved on since 2013. We do this in three key ways:

- A look at **major sector developments** and how they affect corporate approaches to responsibility.
- A review of how **expectations on media companies** have changed, using Twitter comments as our source.
- An analysis of **how media companies report** on their approaches to responsibility.

## Sector developments

The media sector continues to develop at pace, along with the technologies it relies on. The developments the sector faces are too plentiful for us to give them sufficient focus here; see our 2017 report, 'The Future of Responsible Media'<sup>10</sup>, for a fuller review. Here we highlight a few of the most significant developments, particularly the influence and management of content by responsible media companies.

<sup>9</sup>World Economic Forum (2020), ([Global Risks Report - A Decade Left](#).)

<sup>10</sup>Christian Toennesen, Simon Hodgson & William Pickett (2017): ([The Future of Responsible Media](#))

## Why focus on climate change?

This report – like its predecessor – is concerned with content impacts or the 'brainprint' of media companies. Essentially, media's cultural footprint.

The previous edition explored this through multiple angles, from disability to the environment, whereas here, the predominant mode of investigation is through the lens of climate change. There are good reasons for this. Recognition of climate change as a societal and business concern has risen beyond belief since 2013, particularly over the past two years. Tracking the rise of climate change-related risks in the World Economic Forum's annual Global Risks Report<sup>9</sup> is a solid indicator of this development. Arguably, it is the defining issue of our time. As such, it is where we have seen – and will continue to see – the most effort being invested by industry in general and media companies specifically.

Climate change will undoubtedly pave the way for how media companies deal with other social and environmental challenges in the future, so we trust and hope the lessons learned by those reading this report will be broadly applicable.

**Trust.** “Today, truth has never been so hotly contested. And that has serious consequences for us both as a democracy and a society.” Tony Hall, Director-General, BBC, 2019<sup>11</sup>.

Content integrity, balance and accuracy have long been critical issues for media, handled on a ‘business as usual’ basis. Since ‘fake news’ dominated headlines in 2016, the conversation on truth and trust has moved onto the C-suite agenda, at the nexus of corporate responsibility and commercial concerns. To provide trustworthy information in a digital age, with rapid and profuse communication, media companies must respond quickly and grapple with vast quantities of information from a vast number of sources.

Since fakenewsgate, the dust has settled and our understanding of misinformation (types, motivations, impacts) has evolved. Notable change has taken place in journalism, and the rise of fact-checking and news verification industries means news organisations are increasingly expert at rapidly identifying reliable sources and sifting through those that aren’t. Other parts of the media sector are also expected to provide timely, accurate content that properly reflects the social norms of the day. Have they met the challenge?

Of course, whilst trust as an issue has risen up the agenda for responsible media companies since 2015, this isn’t a new topic. Our media materiality reviews conducted in both 2013<sup>12</sup> and 2018<sup>13</sup> found issues for media companies around editorial guidelines, impartial and balanced content, media literacy, as well as transparent ownership, corporate governance, customer and relationships.

Ipsos Mori suggests that trust in traditional media has remained relatively static, whilst trust in digital media has been at a generally lower level than traditional media – with a generational divide (younger consumers are more likely to trust digital)<sup>14</sup>. In fact, according to their long-running Veracity Index, trust in journalists has actually increased since 1983, while trust in newsreaders remained constant<sup>15</sup>. Would this suggest the post-truth age was overplayed? Perhaps, but with the proliferation of ‘clickbait’ in advertising, advancements in AI, virtual/augmented reality and ‘deep fakes’, the challenge of determining what’s real is becoming harder. Since 2013, how media companies ensure content integrity has already been substantially stress-tested, and their capabilities have improved. That’s a good thing, because the level of expectation placed on media companies to provide balanced, accurate, responsible content doesn’t look likely to dissipate.

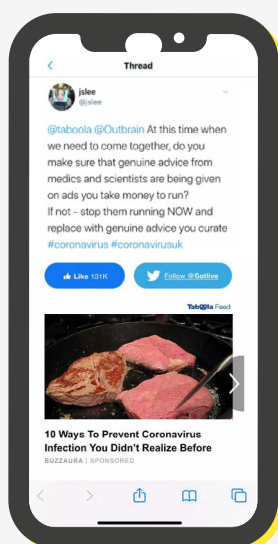


Exhibit 5a: Digital advertising agencies Taboola and Outbrain slammed for sharing Coronavirus ‘fake news’ click-bait;



Exhibit 5b: Damian Collins MP puts pressure on social media platforms to stop sharing Coronavirus fake news

<sup>11</sup>BBC (2019): (*The BBC and the future of news*)

<sup>12</sup>Simon Hodgson, Francis Mimmack & Christian Toennesen (2013): (*Does it matter? An analysis of sustainability issues in the media sector*)

<sup>13</sup>Christian Toennesen, Simon Hodgson & Rosie Towe (2018): (*2018 Media Materiality Report*).

<sup>14</sup>Ipsos Mori (2019): (*Trust: The Truth?*)

<sup>15</sup>Ipsos Mori (2018): (*The Veracity Index*)

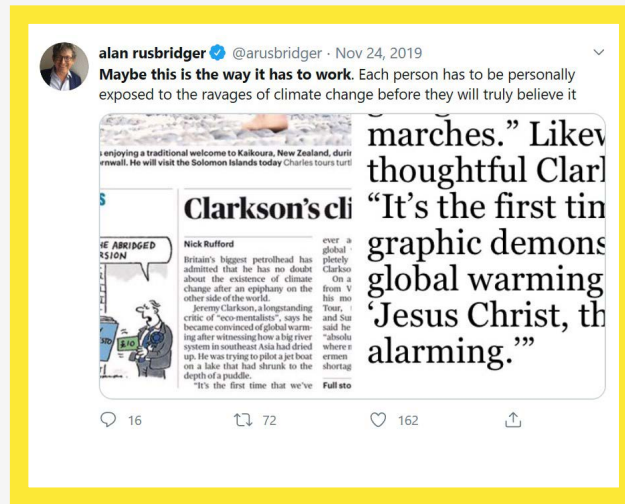
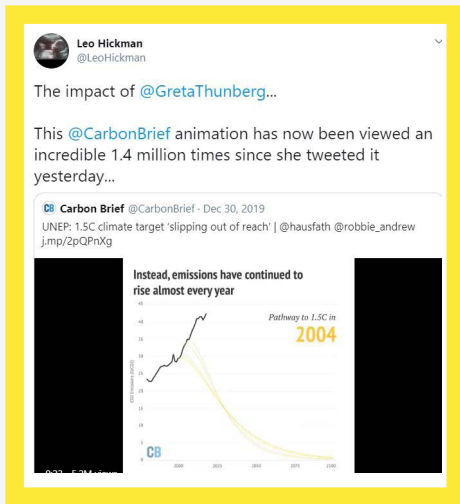


Exhibit 6: Commentators on the media's climate change brainprint

**Influential stakeholders are shifting focus to content.** When Ofcom – the UK media communications industry regulator – benchmarked data on the workforce diversity of UK broadcasters, it set out clear expectations: the connection between off-screen diversity and on-screen representation is of public interest, and broadcasters must represent society or lose their license to operate<sup>16</sup> (Exhibit 8). Around the same time, Project Diamond<sup>17</sup> – a collaborative initiative between the main UK broadcasters – began publicly reporting the diversity of UK television, with an explicit on-screen aspect to the data. Their analysis includes both on-screen and off-screen employees and the supply chain such as production and development.

Also in broadcast, Albert<sup>18</sup> – the TV and film industry consortium for environmental impacts, currently led by its Commissioning Directorate: BBC, ITV, C4, Sky and Netflix – has turned its attention to 'the brainprint' (see Exhibit 6 for examples). In 2018, albert launched Planet Placement to provide “a creative guide to putting the planet into programme editorial” (Exhibit 7). With the vocal support of big-hitters Christiana Figueres and Sir David Attenborough, as well as albert’s members drawn from across the media sector, the initiative sets out practical and specific guidance to content makers. The guidance covers both subject matter – which environmental topics are priorities, and what are the key facts – and how to cover them in content in order to create attitude and behaviour change in viewers.

**“There are two ways you can embed sustainability into your content. You can raise the issues in a way that inspires your audiences to take action. Or you can normalise sustainable behaviours on screen.”**

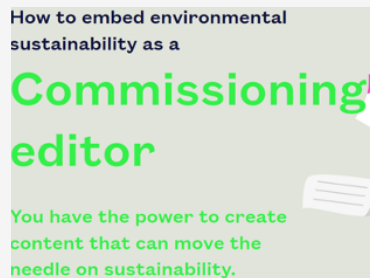
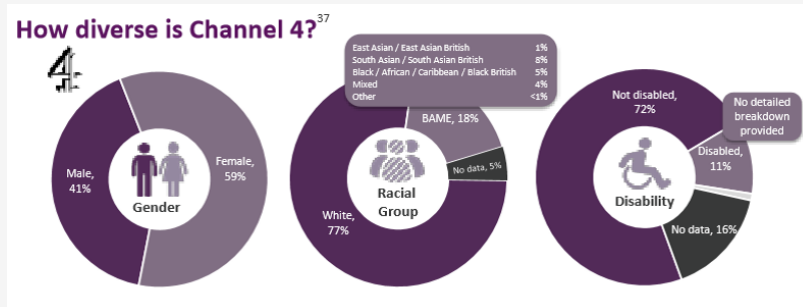


Exhibit 7: Examples from Albert's Planet Placement initiative.

<sup>16</sup>Ofcom (2017): (*Diversity in Television*)

<sup>17</sup>Creative Diversity Network (2017): (*Diamond – The First Cut*)

<sup>18</sup>Albert, (*Planet Placement*)



We have required broadcasters to provide data on the three characteristics where we have powers to do so: gender; racial group; and disability. In addition, we have requested data on other 'protected characteristics' in the Equality Act 2010:<sup>4</sup> age; sexual orientation; religion or belief; pregnancy and maternity; and gender reassignment.<sup>5</sup>

We recently<sup>6</sup> wrote to the Secretary of State for Digital, Culture, Media and Sport to request legislative change which would, among other things, allow us to require broadcasters to provide information on these additional characteristics in the future.

Exhibit 8: Excerpts from Ofcom's 'Diversity in Television' report, 201

**The rise of the dual pledge.** The emphasis on content has also given rise to an era of 'dual pledges', sustainability commitments encompassing operational as well as content objectives. While media companies' sustainability strategies were in the past at best tangential to content strategies, we now see a serious overlap between the two starting to form. To give just a few examples:

- Launched in October 2019, the Guardian's environmental pledge 'We believe' positioned the company's ambition to achieve net zero greenhouse gas emissions by 2030 alongside a raft of content commitments. These include no longer accepting advertising from fossil fuel extractive companies, "playing a leading role in reporting on the climate catastrophe" and adopting language that reflects the "severity of the crisis", e.g. referring to climate change as the climate crisis or emergency.
- Sky's #GoZero strategy, launched in February 2020, contains an overarching target for the company to achieve net zero carbon emissions by 2030 through a mix of reduction measures and offsetting via investment in natural carbon sinks. The pledge also has a content angle, including a commitment to create new TV shows "to spread the word."
- The BBC launched its environmental sustainability strategy 'Greener Broadcasting' in November 2018, which set out the corporation's science based carbon reduction target next to a pledge to "provide content to educate and inspire positive change." In February 2020, this was complemented by Our Planet Matters, an audience-facing plan that will see the BBC's Digital, TV and radio channels "take part in a year-long special programming & coverage of climate change."

There is strong argument to be made that for any future sustainability strategy by any media company to be credible, it will need to incorporate both operational and content dimensions. The common denominator in the examples above – and there are many more – is climate change, but the rise of the 'dual pledge' is likely to extend to other social and environmental causes too. This, in turn, calls into question the ability of media companies to measure their content impacts, with current frameworks and approaches being embryonic compared to those covering operational impacts. We will return to the question of measurement on page 30.

**Mass communication disrupted.** In some ways, reaching global audiences en masse is more achievable than ever. Look at the public health messaging distributed across the world in response to Covid-19; the phenomenon of Greta Thunberg, who has achieved international renown and communicates largely via social media; and the massive global distribution of Blue Planet and Our Planet.

In other ways, the days of a clear national conversation are – if not over, then – irrevocably changed. Digital media has democratised many forms of content, with writers, journalists and broadcasters (whether professional or amateur) able to essentially ‘self-publish’, allowing a multitude of voices into any debate. In UK television, for example, a few main channels now hold a far smaller share of audience figures<sup>19</sup>, with audiences (especially younger audiences) further spread across online streaming services, catch-up and view-on-demand (VOD) services.

And as digital communication has mainstreamed, advantages are on offer for the platforms and channels able to turn the best data and algorithms into intelligent advice to users, with ever-more personalised interfaces and recommendations based on an individual user’s behaviour and preferences<sup>20</sup>. The risk is that we are exposed only to content we agree with, and that those with extreme views can find support and affirmation<sup>21</sup>; many feel that it’s the media sector’s responsibility to challenge such filter bubbles and echo chambers<sup>22</sup>.

What does this mean for major health crises like Covid-19 and for sustainability issues like the climate emergency and wider environmental breakdown? For a media company aiming to create a meaningful impact against these issues through its content, complexity comes not only in articulating the science itself to a mass audience, but also in ensuring these messages reach a broad base of society – including those without a pre-existing interest, and those who feel the environmental crisis is overplayed.

Examples such as Sky’s Ocean Rescue campaign, Silverback Productions’ Blue Planet and Our Planet series aired on BBC and Netflix respectively, and Greta Thunberg have navigated such complexities and garnered attention from across the world. Hopefully, they are evidence that Alan Rusbridger’s concern – that each individual must be personally exposed to the effects of the climate crisis in order to be convinced of the urgency – is unfounded.

<sup>19</sup> BARB, ([Annual % share of viewing – individuals 1981-2018](#))

<sup>20</sup>Kantar (2019): ([Kantar Media Predictions 2020](#)).

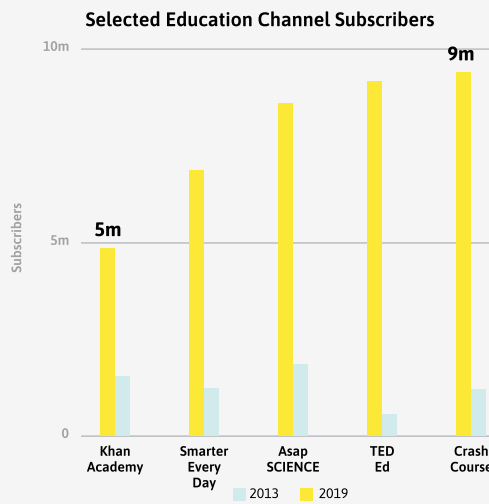
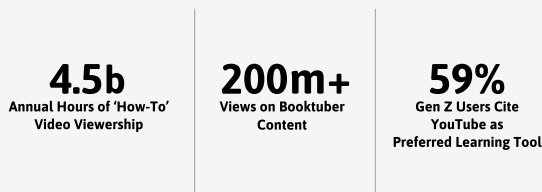
<sup>21</sup>Bond (2019): ([Internet Trends 2019 – “Unintended Bad Actors Can Amplify Misinformation”](#))

<sup>22</sup>FAZ (2016): ([Angela Merkel calls for more transparency from Google and Facebook](#))

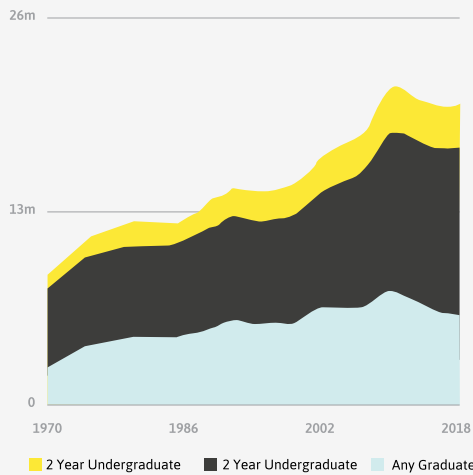
**Media is entering new territories.** Specifically influencers, education and gaming. How so?

Education appears to be going online, at least in the US where the enrolment in post-secondary education is slowing, whilst the share of students enrolled in online courses is increasing. The younger generation is increasingly looking to digital media, such as YouTube, as an educational tool<sup>23</sup>.

For media companies that provide education this presents new or increased responsibilities towards learners. For example, BBC’s Bitesize resources for school students, which has already reached 75% of UK secondary school age pupils<sup>24</sup> before Covid-19 and has added live daily content to its offering during the pandemic<sup>25</sup>. Their expectations range from the familiar (quality, up-to-date content that’s easy to access and affordable) to the uncharted (topic-specific online learning communities, rigorous and fair assessments, certifications and accreditations, and so on). Partnerships with specialist education organisations are likely to be key unlockers as media companies enter this domain.



**Post-Secondary Education - Enrollments**



**Post-Secondary Students - % In Only Offline Courses**

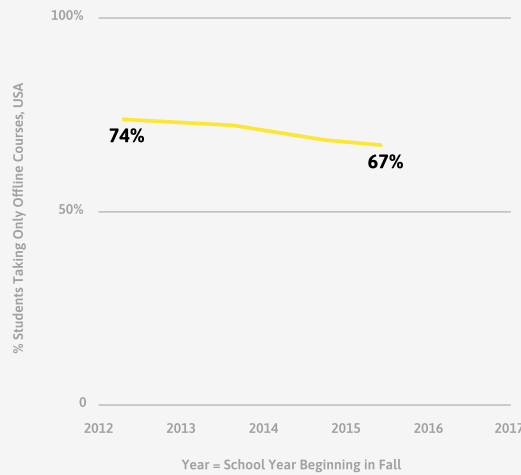


Exhibit 9: The norming of online education

It would be neglectful to omit influencers – social media darlings broadcasting direct to an enormous audience of followers; and reality stars – often thrust into the limelight at breakneck speed. They have become important culture-setters especially amongst younger audiences. Influencers’ popularity may have begun as niche operators on digital platforms but their content has achieved incredible reach, their profiles are massive and their opinions and messages are often pushed out with few of the checks and balances that responsible media companies apply. In giving voice to these online and reality stars, media companies are rapidly learning important lessons in engaging future audiences in an authentic and sustainable way.

<sup>23</sup>Bond (2019): ('Internet Trends 2019 – "Offline Education Enrolment"')

<sup>24</sup>HM: BBC (2019), (Group Annual Report and Accounts, 2018/19)

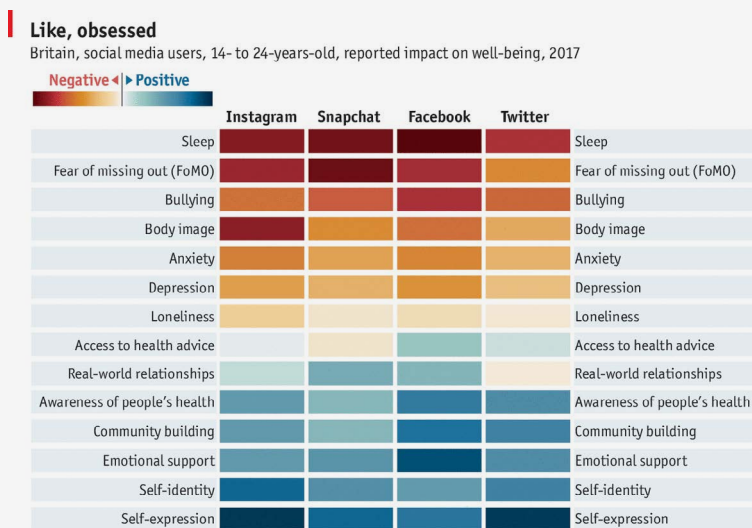
<sup>25</sup><https://www.bbc.co.uk/news/entertainment-arts-52149409>

Meanwhile interactive gaming and esports are becoming ever more popular, not just with youth audiences – ‘grown ups’ are paying attention too. Accordingly the industry is attracting sponsorship from mainstream brands. To access the users and ad revenues on offer, media companies are making bolder plays into this relatively new arena, like Latin America’s leading TV network, Globo, which broadcasts live esports tournaments in prime-time slots<sup>26</sup>. Such content is “social in nearly all ways”<sup>27</sup>, with the most popular games built around active global communities of gamers.

With this development, media companies are entering a new world of responsibilities. As the betting & gaming industry knows, there are substantial expectations and regulations attached to the provision or enablement of these types of content.

There have been efforts to unblur these lines. When Modern Times Group split into two companies in 2018 – MTG and Nordic Entertainment Group – MTG announced its intention to become “the only publicly traded, pure play esports, online gaming and digital video content company in the western hemisphere”<sup>28</sup>, separating itself from its broadcasting, digital communication and content production sibling.

**The onwards march of mobile.** To maintain the vital flow of digital advertising spend, media companies will need to place a heavy focus on mobile content<sup>29</sup>. While there are clear benefits of being able to easily and cheaply connect online with friends, relatives and likeminded individuals, the links between social media and mental health are attracting attention.



Source: Royal Society for Public Health

Exhibit 10: Social media and well-being in teenagers

There are health and well-being concerns about time spent on mobile devices, with 63% of US consumers trying to limit their mobile usage<sup>30</sup>, which draws attention to the tech industries’ (deliberate) attempts to keep users online, at all costs. The focus is currently directed towards social media platforms (Exhibit 10<sup>31</sup>), but as media companies move into this domain, it’s worth paying attention to.

<sup>26</sup> Kantar (2019): ('Kantar Media Predictions 2020')

<sup>27</sup> Bond (2019): ('Internet Trends 2019 – “Interactive Gaming Innovation”')

<sup>28</sup> MTG (2018): ('MTG to split in two and distribute shares in Nordic Entertainment Group to shareholders')

<sup>29</sup> Bond (2019): ('Internet Trends 2019 – “Digital Media Usage = Accelerating”')

<sup>30</sup> Deloitte (2018): ('Global Mobile Consumer Survey, US Edition')

<sup>31</sup> The Economist (2018): ('How heavy use of social media is linked to mental illness')





## How media companies report on content

We repeated our analysis of media companies' corporate responsibility reports<sup>32</sup> (variously termed "CR", sustainability, social impact and so on). Comparing media CR reports published in 2018 with 2011, the number and proportion of pages devoted to content and environment have climbed slightly. However looking at the average number of KPIs attributed to each topic is revealing. Whilst environmental KPIs have slightly decreased in number, the KPIs devoted to content have increased exponentially from 3 to 10 per report, on average. It's worth noting that this increase is substantially driven by the broadcasters (see Exhibits 12 and 13)

We noted a proliferation of responsibility reporting formats in 'The Future of Responsible Media', with companies using one or more (or all) of these: corporate websites, annual report and accounts, a standalone responsibility report or summary. More recently, companies have started to publish standalone reports or 'updates' on specific campaigns and issues, such as Sky's Bigger Picture report focusing on Ocean Rescue and single-use plastics and Penguin Random House's social impact highlights.

### What do media companies talk about in their CR reports?

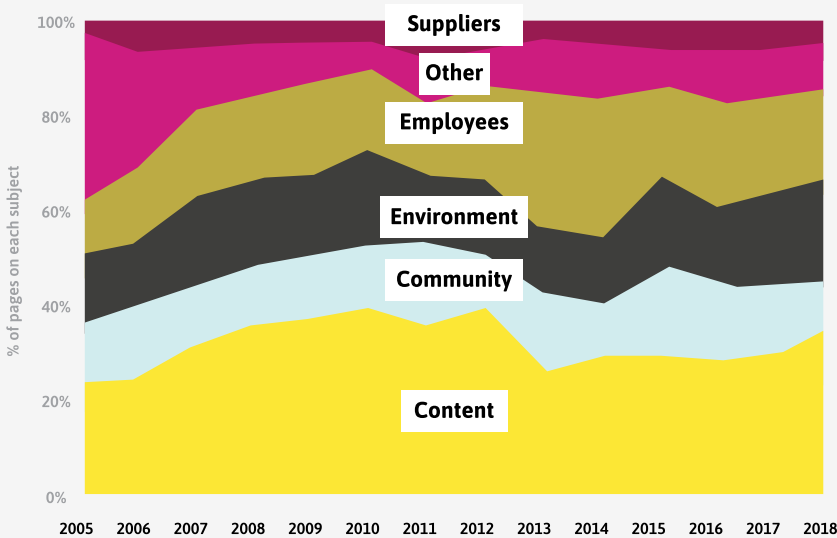


Exhibit 12: Topics of focus within media companies CR reports between 2005 and 2019

### KPIs published in media CR reports, 2011 versus 2018

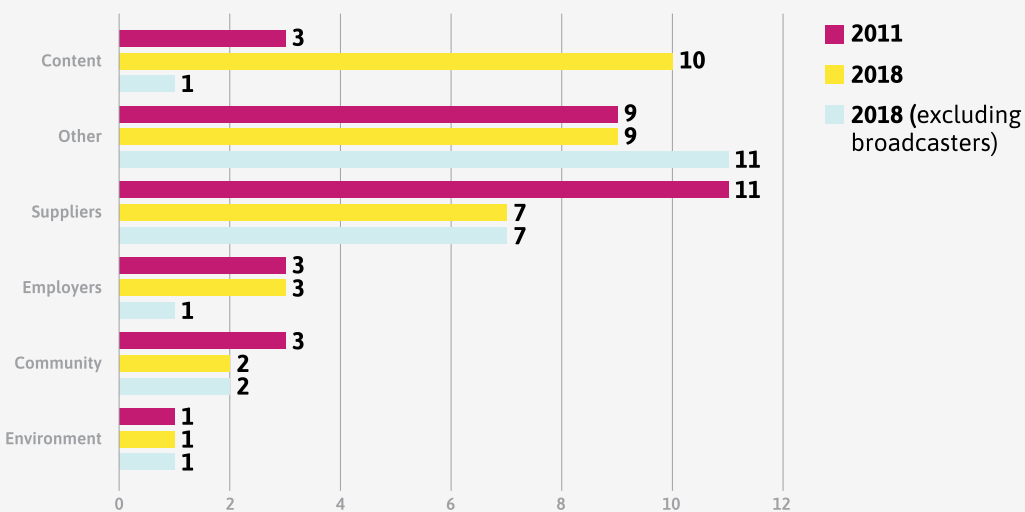


Exhibit 13: KPIs per topic in media sector CR reports

<sup>32</sup>We analysed the following companies: BBC, Bertelsmann, Channel 4, ITV, Modern Times Group, Pearson, RELX Group, Sky, and Vivendi. To maintain comparability and accuracy, we had to remove Guardian News & Media (GNM) from the analysis as they stopped publishing responsibility reports from the 2016 reporting year. Figures for 2005-2016 have been updated to that effect.

# THE STATE OF PLAY FOR CONTENT IMPACTS TODAY

In 2013, our report proposed six influence or impact modes, through which media content effects society.

## Questioning

Challenging existing practices and structures in society, highlighting adverse effects and bringing to light hidden information which leads to subsequent changes in policy or behaviour



## Silencing

Ignoring or restricting voices on certain topics, events or groups, knowingly or not, with the effect of creating a particular representation of society which differs from the reality...



## Campaigning

Deliberately taking a partisan stance on an issue topic or product with the explicit aim of selling, changing behaviour or raising money



## Amplifying

...or, conversely, giving disproportionate voice to or coverage of certain topics, events or groups, again creating a particular representation of society which differs from the reality.



## Inspiring

Stimulating action via changed perspectives, alternative futures or by highlighting different ways of behaving.



## Normalising

Introducing or legitimising forms of behaviour that may otherwise be unknown or marginal.



Exhibit 14: The content impact modes: Six ways or 'modes' through which media content impacts society

How are media companies managing their content impacts today – and what's changed since 2013? Is the approach more or less proactive? Is the topic higher or lower on the agenda? What role does the corporate responsibility function play in driving content responsibility? And, do our impact modes still hold true? We posed these questions to the people leading the responsibility agenda in 11 large media companies. Out of these interviews and conversations, we defined the key ways in which the content has moved on since 2013.

Key questions and answers informed by interviews with responsibility professionals working in the media industry, conducted in July, August and September 2019.

## What developments have there been since 2013? Have content impacts risen or fallen on the agenda in your organisation?

The short answer is: Yes, media responsibility professionals get asked more questions and do more work around content impacts than ever before. “The interest in using content has shifted significantly – we’re using more and more of our content to engage with audiences proactively”. Lots of reasons were given, depending on the company and industry sub-sector:

- Internal push from executives who’ve caught up with the sustainability agenda, often because they are interested in a personal capacity. Senior execs have played a key role.
- Push from clients (in client-driven industries). The view from advertising is that brands submit briefs with societal impacts, which in turn is driven by consumers wanting more meaningful products. The [CMO survey](#) indicates consumers want a ‘meaningful life’, whatever that means. At the same time, 75% of top marketers now consider purpose to be important.
- Push from employees and potential talent. “I couldn’t hire the best people if I didn’t have a clear purpose and sustainability story”.
- Because it’s positive: the conversation around managing content impacts is, in large part, about seizing an opportunity rather than responding to a risk-driven agenda, as is so often the case in sustainability. However as one interviewee noted, “the license to do interesting things often depends on having the house in order”.
- With a few exceptions, the push for responsible content is not coming from legislation or investors nor existing benchmarks and raters; “there’s been some progress but it’s baby steps, investors still don’t get it”.
- Activism is going mainstream; from celebrating Pride to brands taking political stances (for the challenges inherent in this approach, refer to Christopher Snowden’s comment in the next section).

“the license to do interesting things often depends on having the house in order”

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“I couldn’t hire the best people if I didn’t have a clear purpose and sustainability story”

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“investors still don’t get it”

## Case Study

**Schibsted’s Blocket**, Sweden’s main online marketplace, participated in White Monday in 2019. This is a countermovement to Black Friday and its push of new products, especially in the electronics category. Blocket halved advertising rates for electronics and pushed the campaign through websites, social media, influencers and events. This helped get more people than ever before to take part in White Monday and buy used instead of new.

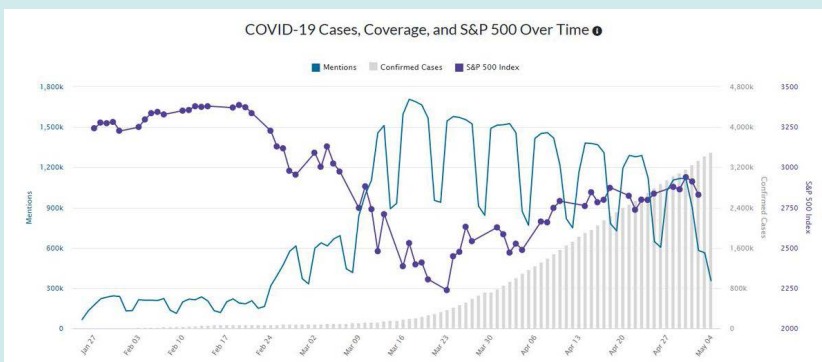
**Dentsu Aegis Network’s** research into Purpose Marketing<sup>33</sup> investigated the rigour behind socially impactful campaigns winning awards at Cannes Lions, finding that robust impact measurement is rare;

<sup>33</sup> ‘Purpose Marketing: Moving away from celebration of intent to measurement of real societal outcomes’, Dentsu Aegis Network, 2017

## What role does the sustainability function play?

The insights from the interviews suggested that much of media companies' successful management of content impacts comes down to passionate individuals and teams implementing their plans and ideas effectively. In interviews, we heard:

- “The evolving focus on content impacts has forced teams to work outside silos – you can’t create purpose and engage your workforce sitting in your office, you have to go out and bring people on board.”
- “Our team always did great stuff with lots of impact, but we were still seen as ‘the CSR team’ – we always felt we could be dropped. That’s changed; CSR is still important but the responsibility function has become indispensable.”
- “Our role has changed from ‘getting the house in order’ to creating purpose. The targets that used to take up most of our time are now at the bottom, we refer to them as organisational behaviour. Instead we focus on SDG engagement directly with consumers.”



RELX has created the [SDG Resource Centre](#), providing the public with leading-edge information on the Sustainable Development Goals including articles, tools, reports, and events. The homepage features the SDG News Tracker, pulling from over 75,000 news sources for up-to-the-minute news on the SDGs in all the UN languages plus German. It is also producing new research for the site, SDG Graphics, including the state of knowledge underpinning the global goals, highlighting where the gaps are, particularly for low-income countries. The site also brings in content from partners, including from across the UN system. More recently, the LexisNexis (a RELX business) [Covid-19 media and news tracker](#) reflects latest global conversations and confidence around the pandemic.

## What does the future hold?

Interviewees shared their perspectives on what’s to come:

- Multi-sector partnerships will be the next big thing, working beyond peers.
- Hopefully, we can build on our foundations as trusted media sources and push the agenda on important issues like climate change.
- Develop expertise in reaching hard-to-reach audiences; not just preaching to the converted.
- Would like to see the sector moving faster on climate change, “properly using our voice”. Media can lead the way; we’re really the only sector that can make people listen. And we have unique powers to influence other sectors and industries.

**Penguin Random House has pledged that their new hires and books will reflect UK society by 2025. To meet this commitment, they have helped new voices develop and publish through WriteNow and showcased careers in publishing to young people in social mobility cold spots through #PRHJobHack.<sup>34</sup>**

<sup>34</sup>Penguin,(Inclusion)

## What are the barriers to progress?

Interviewees talked about a number of challenges that inhibit progress on successful management of content impacts. Here we highlight a few:



- We can do a lot to influence internal stakeholders but the chain down to account executives is long.
- Short-termism and more acute or immediate threats mean work to progress content impacts can be shelved.
- Partnerships are key, for example to scientifically evaluate the impacts of content. But the right partners aren't always available.

**Channel 4's coverage of the paralympics is regarded as world leading. In the UK, it has made 80% of the 11.9m viewers think about disability and the challenges it brings with in a different way, with 53% feeling it has challenged their existing perceptions of disability.**<sup>35</sup>

## What's the state of measurement?

- This is one area that hasn't developed. Content impact measurement is generally retrospective and not developed as a discipline. In-depth, rigorous studies are rare and expensive.
- Some have partnered with external organisations to rubberstamp their efforts, e.g. the Cambridge Institute for Sustainability Leadership and Forum for the Future.
- The BBC Audiences Impact team creates a quarterly impact report. Regular reporting and internal awareness raising are key to create an 'impact culture'.

And what does this mean for content? Well, since 2013, we've seen media's content impacts demonstrated in a host of new ways:

Mode	Examples
 <p>Questioning</p>	<ul style="list-style-type: none"> <li>• <b>Smashing taboos:</b> #metoo initiating a global conversation about appropriate behaviour in the workplace and highlighting instances of harassment.</li> <li>• <b>Wearing principles "on your sleeve":</b> Dutch newspaper, De Correspondent, launched with Crowdfunded support and a mission to do journalism differently, applying its 10 principles around transparency, inclusivity and social proactivity.</li> </ul>
 <p>Campaigning</p>	<ul style="list-style-type: none"> <li>• <b>Advertising industry getting proactive:</b> In 2018, Cannes Lions awards two Grand Prix to LADBible and The Plastic Oceans Foundation campaign, in which they applied to the UN to have a mountain of trash in the North Pacific Ocean registered as an official country.</li> <li>• <b>Social media as a tool for change:</b> TikTok users covertly using online make-up tutorials (and other innocuous user content) to draw attention to rights abuses such as the treatment of the Uighur community in China; Greta Thunberg and Extinction Rebellion hurtling to superstardom via Twitter and other platforms.</li> <li>• <b>...and the documentary format carried on its campaigning heritage:</b> Caracol's 'The Path of the Anaconda', a feature-length documentary drawing attention to biodiversity loss in the Amazon.</li> </ul>

<sup>35</sup> Channel 4 (2018): ('Channel Four Television Corporation Report and Financial Statements 2018').



Inspiring

- **Encouraging individual behaviour changes:** Sky's Ocean Rescue on single-use plastics
- **Publishing dedicating content to sustainability:** Marie Claire's first dedicated "Sustainability Issue" in 2017, The Economist and National Geographic dedicating issues to climate change and the Arctic respectively.
- **Reuniting a divided community:** RCN's "No Olvidarás Mi Nombre" soap opera included messaging on reconciliation after the peace treaty between the Colombian government and FARC rebel group, which was proven to increase understanding of the 'other' side, tendency to forgive and reconciliation among viewers (see case study on pages 25 and 26).



Silencing

- **Diverting support from negative online activity:** Brands such as Accenture Interactive, The Body Shop and ecover committing to stop spending (largely, digital) ad revenues in ways that support negative online phenomena and behaviours such as hate speech, misinformation, and non-inclusive representations of communities; facilitated by the Conscious Advertising Network.
- **Stemming fossil fuel advertising:** Through the Creative Climate Disclosure initiative, advertising agencies pledged to disclose their revenues from the fossil fuel industry, whilst individuals pledged to cease working on these creative briefs. Meanwhile, The Guardian's "keep it in the ground" campaign on divestment and, more recently, pledge to stop taking £ from fossil fuel companies in advertising.



Amplifying

- **Information is power:** Last year, RELX made 5000 articles on climate change freely available to a global public through its SDG Resource Centre. Meanwhile Informa launched SDG: Online, a curated library to support understanding and progress against the SDGs. Both resources serve to amplify the UN and its partners' messages but also to educate audiences on the SDGs.



Normalising

- **Inclusive programming:** A range of efforts and initiatives to increase (and improve) the on-screen representation of BAME and disabled people<sup>36</sup>, notably Channel 4's "superhumans" Paralympics coverage in 2012 and 2016.
- **"Finding the climate change angle in everything":** Albert's Planet Placement initiative to engage and upskill content creators in film and television to embed environmental issues across their output. Meanwhile Spanish media companies released a media statement on climate change in 2019, including 10 principles to better communicate on climate change.

<sup>36</sup>Latest research from the UK shows that disabled people are still under-represented on and off-screen, whilst BAME people now only under-represented in off-screen roles

# CASE STUDY: SKY OCEAN RESCUE

## How did Sky Ocean Rescue start?

Sky launched Ocean Rescue in 2017 to use its voice to inspire people to take action on ocean health, starting through the lens of ocean plastic. Sky has form when it comes to large-scale campaigns, previously focusing on issues including across community, young people, environment and sport. Realising their operations' footprint is small, the Sky team wanted a large consumer-facing campaign that would use their significant 'brainprint' to inspire people. The final decision was driven by the Head of Sky News, who saw plastics rising on the agenda and was flabbergasted by the scale of the issue when he produced a documentary on ocean plastics<sup>37</sup>.

## Who are the key stakeholders and how do they work together?

Although initiated by Sky's Responsible Business team, keeping Ocean Rescue as a "CSR initiative" would limit its ambition and scale. Partnerships were key. Ocean Rescue took over productions and used content to raise awareness, for example through features in Italian X-Factor and Sky News, where the newsroom was drowned in plastic to show how disruptive it is for marine life. To maximise reach, external partnerships were established: for example, with the Premier League, taking over Super Sunday matches between top teams to engage hard-to-reach audiences; and with WWF to protect marine areas and boost UK seas' carbon sequestration potential. On top, a £25m Sky Ocean Ventures fund was set up to invest in innovations to reduce single-use plastics, with a focus on tackling difficult-to-substitute items, partnering with National Geographic and Innovate UK<sup>38</sup>.

## What have been the key impacts?

To date, Ocean Rescue can boast impressive engagement metrics: 33.5m people are aware of Sky Ocean Rescue in core markets; 1m people engaged with the Twitter campaign #PassOnPlastic; over 220 MPs and MEPs signed up to the campaign, pledging to change their behaviour; 7m people say they have changed their behaviour on at least one single-use plastic item to date; 3m people engaged with Plasticus at 25 locations in the UK. Plasticus is a plastic whale made from ocean plastic, and at a quarter ton weighs the same as the plastic that enters our oceans every second<sup>39</sup>.

## What's next for Sky Ocean Rescue?

Sky will continue working to maximise Ocean Rescue's reach through its partners. It is important to get the journey right; Premier League football clubs will need to change behaviour, such as the sales of drinks in single-use plastic cups. Trials of a reusable, return cup have been run and fully implemented at a number of clubs. Sky remains committed to restoring the health of our ocean with our long-term partner WWF. Together, we're replanting seagrass meadows to help restore natural carbon sinks and campaigning for bold government policy change to not only safeguard but help recover the health of our ocean. We will be asking millions to step up and join us and be the Ocean Heroes our ocean needs.

## If you could give one piece of advice to media companies wanting to use content as a plank of their responsibility strategy, what would it be?

Collaborate with as many partners as possible. Be creative – you may need to transform your own business practices to have a credible voice. Make the issue local and personal. Don't shy away from the science, whilst also inspiring audiences to make simple everyday changes.

<sup>37</sup>Fiona Ball, presentation to Mirrors or Movers VII, 18 September 2019, London

<sup>38</sup>Edie (2019): ('Ocean Rescue: how Sky's plastics campaign has ignited a wave of transformation')

<sup>39</sup>Sky (2018): ('Sky Bigger Picture Impact Report 2018')





# CASE STUDY: RCN RADIO & TELEVISION

## How did your work on content impacts start?

The owners of RCN have had a long-standing commitment to benefitting Colombian society. They saw making socially impactful programmes as both a business and social opportunity, and have been willing to experiment. In their experience, script writers and producers' main objective is to entertain, but they are happy to positively influence audiences too if they can.

RCN has a history of using content to build awareness and understanding on social issues, including on domestic violence prevention, teenage pregnancy, sexual abuse, and gender violence. When the Colombian Government signed a peace agreement with a guerilla group it had been fighting for 50 years in 2017, RCN realised that further efforts were needed for citizens to heal social wounds, 'disarm their souls' and combat stereotypes about those who acted in the conflict. So, it created the telenovela *No Olvidaras Mi Nombre* (You Won't Forget My Name), with the goals to combat stereotypes, promote peaceful coexistence, and connect victims and the demobilised with rehabilitation support. Through the show, RCN partnered with many experts, including USAID, the International Organization for Migration, UN Refugee Agency, and the National Agency for Reintegration<sup>40</sup>.

## Who are the key stakeholders and how do they work together?

RCN has had a social marketing department for 23 years. Dedicated people look ahead at upcoming social issues and identify opportunities to address these through impactful content and partnerships. Many partnerships are with the Colombian Government, which needs to collaborate with media to achieve policy goals. Once an issue has been identified which RCN would like to tackle through a programme, creatives and writers are linked up with issue experts from government, science and civil society to ensure a balanced, meaningful and nuanced approach. Journalists and news programmes participate as well, helping to put social issues under the spotlight of public opinion

<sup>40</sup>Ana Maria Guerrero, presentation to Mirrors or Movers VI, 2 October 2018, London



### **What have been the key impacts?**

USAID sponsored an impact evaluation of No Olvidaras Mi Nombre, conducting close to 10,000 personal surveys, 50 focus groups, 40 role play games and 50 in-depth interviews across 20 towns in Colombia. The results allowed RCN to conclude that those who watched the show changed their perceptions, creating a more positive perception of the ex-armed group's reintegration into civil society. The series humanised those involved in the conflict; gave voice to victims; and fostered understanding and forgiveness on both sides. An average of 2.8m people watched the series, with over 4m visits to the webpage with additional resources, and 1m video reproductions of episodes<sup>41</sup>.

### **Were there any challenges on the way? What were they?**

The main challenge is measurement. Impact is difficult (and costly!) to measure. Isolating a programme's impact from all the other factors is highly complex, and inevitably, people perceive certain storylines or approaches in a subjective way; what comforts some may offend others. In addition, increasing competition for people's attention with new content platforms and technologies.

### **What's next for RCN?**

We would like to do more detailed evaluations of programmes that have been produced with societal impact in mind, but cost is a barrier. We aim to solve this by finding co-financing partners. We know the University of California San Diego works with Hollywood productions to evaluate programme impacts, with funding by the Bill & Melinda Gates Foundation; we would like to approach Colombian universities to partner on evaluating the social impact of media content.

### **If you could give one piece of advice to media companies wanting to use content as a plank of their responsibility strategy, what would it be?**

Learn the art of coupling financial performance with social responsibility. You will need to find win-wins; if you come at it from only the philanthropic or financial side, you will not be as successful.

<sup>41</sup>Ana Maria Guerrero, presentation to Mirrors or Movers VI, 2 October 2018, London

# CHALLENGES TO THE SECTOR

During our research and as part of the normal meetings and operations of the Forum, we spoke with a number of outside experts and industry commentators. Many observed a sector that's maturing in its approach to responsibility, coming to grips with its unique contribution to society.

Several posed challenges to the sector; here we highlight three. Jon Alexander argues that, as we evolve from people to citizens, media needs to equip and enable rather than merely entertain and inform. Damian Collins MP outlines how mainstream can beat social through trust and credibility. Christopher Snowden argues that media companies are overstepping their mark on sustainability, undermining their role as arbiter of truth, and underpinning an increasingly polarised world of digital communications. Whilst academic Kate Starbird contends that media will need to rethink its responsibilities in light of global health crises like Covid-19. The bottom line: as society changes, media needs to change with it, ensuring its purpose is fit for the new challenges ahead. This is a challenge and an opportunity.

“

Many of the old ways – whether in media companies, in government, or anywhere else – are breaking down around us. The digital age makes us expect to shape the world we live in and have the opportunity to work together as citizens who participate and create, not simply choose between the options offered to us as consumers.

In this context, media brands across all sub-sectors need to equip and enable, not merely entertain and inform. The Correspondent is an early pioneer: editor-in-chief Rob Wijnberg articulates its purpose as being to ‘unbreak news’; the company views readers as ‘expert contributors’ and journalists as ‘conversation leaders’. At its best, this shift has the potential to resolve the old tension between commercial and editorial, as companies come together in service of a higher purpose. Corporate Responsibility and Sustainability teams have an opportunity to drive this soul-searching, by being the Occupy or Extinction Rebellion from within.

”

**Jon Alexander**  
Co-Founder, New Citizenship Project

**Media companies  
need to rediscover  
their purpose to  
equip and enable  
citizens**

“

The value of mainstream media is based on trust. That trust is based on a media company's values and practices, which are its source of credibility. For example, the media can run campaigns to inform society, but need to maintain a broad focus and give voice to alternative opinions.

The rise of social media has led to shifts in how people consume media content and has allowed politicians to talk to their base directly. As free press audience numbers dwindle, we are losing it as a strong gatekeeper and challenger, which is important in a democracy.

Mainstream media could use this environment of increasing confusion and mistrust to their advantage. Can brands built on trust and credibility re-connect with audiences, both old and young?

”

**Damian Collins MP**

Chairman of the House of Commons Digital, Culture, Media and Sport Select Committee from 2016 to 2019

## Trust, credibility and the epic battle between mainstream and social

## Responsible responses to health crises like Covid-19

“

Historically, the biggest challenge for communities experiencing a crisis event was often a lack of information, especially information from official sources. In that void, people would share information with their families, friends, and neighbors, to try to make the best decisions. In the connected era, the problem isn't a lack of information, but an overabundance of information and the challenge of figuring out which information we should trust and which information we shouldn't.

Exploitative behaviours have grown in an age of digital communication. We now see the intentional spread of disinformation for financial and/or political gain during every crisis event, in larger and larger volumes. And Covid-19 is no different.

Crisis communicators should rely on the knowledge of experts (e.g. medical professionals and epidemiologists) and work to remain consistent across their agency or agencies. It is also important to effectively communicate the inherent uncertainty of the event and help people understand that the facts may change over time as we learn more.

”

**Kate Starbird**

Associate Professor of Human Centered Design & Engineering at University of Washington; Researcher of crisis informatics and online rumors.

“

Today, there's not enough balanced, open debate on issues. Instead it seems that many journalists, and audiences, want to silence opposing viewpoints. There's a common assumption of bad motives; people believe so strongly in their own view, they assume anyone with an alternative perspective has an ulterior motive.

What's more, broadcasters are pushing their stances more aggressively, and that is fundamentally damaging to their ability to show balance and act as arbiters of truth. Companies like Sky and ITV are private companies, so they can support whatever environmental or social campaign they want, in theory. It may not be much of an issue on something like ocean pollution, which is clearly a bad thing, but it would worry me if a media company was pushing something I disagree with, like a sugar tax. Or, a contestable issue like whether we Brexit.

Twitter makes sensible people say crazy, extreme things. Hungry for followers and retweets, “sensible people like David Lammy and Krishnan Guru-Murthy, come across as lunatics”. This platform – the fact that people can share their viewpoints so often (and after a glass of wine) – encourages partisan, extreme viewpoints.

”

**Christopher Snowdon**

Director of Lifestyle Economics at the Institute of Economic Affairs

**We're all complicit  
in creating a  
polarised media  
narrative**

# UNDERSTANDING AND MEASURING INFLUENCE

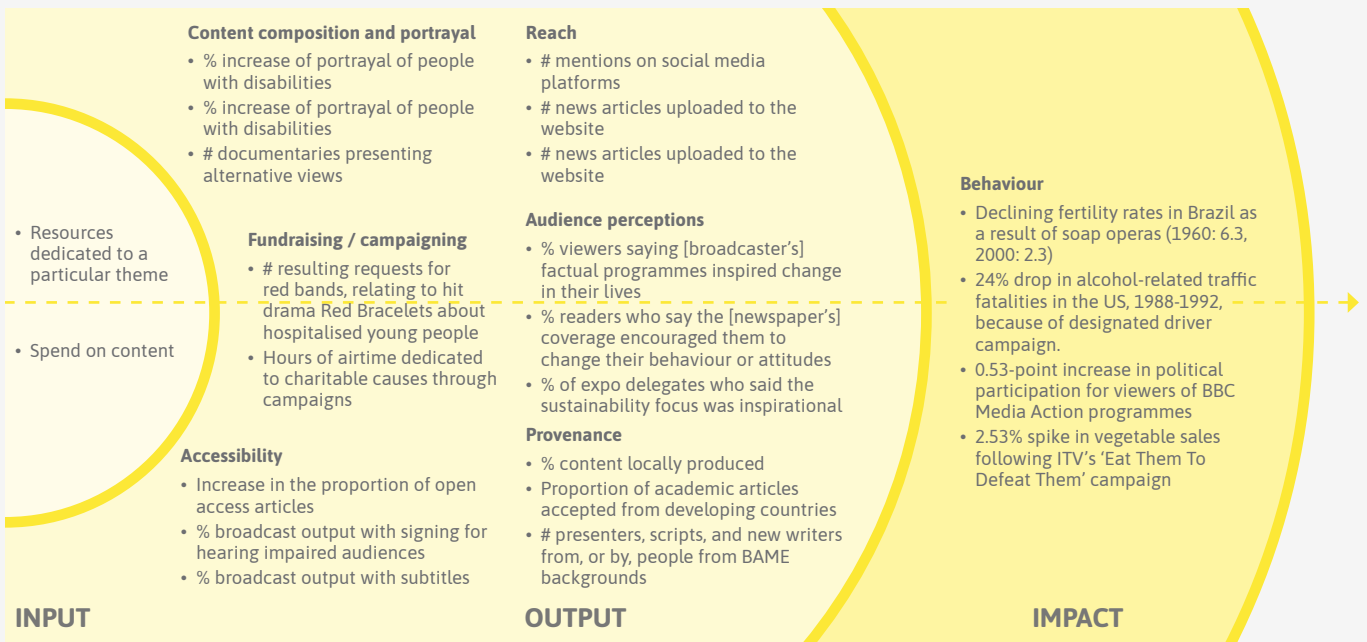
Measuring media’s brainprint is not straightforward; the impact of one piece of content will affect one person differently to the next based on a range of personal and cultural factors, and applying hard metrics to social effects is often imprecise. Not only that, because media covers all topics, it’s problematic to apply consistent measures across content – any KPIs used will likely need to be unique to the theme, or even the individual piece of content. Despite these challenges, our analysis (pg 17) showed media companies dedicating the same amount of reporting pages to content (about a third of responsibility reports) with more KPIs today than in 2013, suggesting that media companies are getting to grips with measuring the impacts of content. However, that increase is mainly driven by broadcasters.

In 2013 most content impact indicators were focused on inputs and outputs: airtime or pages devoted to issues, number of readers or audience members reached, and so on. In 2019, broadcasters started moving towards outputs and impacts. KPIs reported by broadcasters were mainly related to audience perceptions, for example survey results on how well alternative voices were portrayed by a company, or perceptions of on-screen diversity. Sky specifically focuses on awareness raised on plastic through its Ocean Rescue campaign, and self-reported behaviour change amongst the audience. Content KPIs reported by non-broadcast companies most commonly related to the accessibility of content and reach.

However, in other fields of sociology and social impact, similarly hard-to-quantify topics have been translated into KPIs, admittedly over time and with a degree of subjectivity. Within the corporate responsibility context specifically, for example, look to the London Benchmarking Group (LBG) framework for comparable data on the social impacts of community investment<sup>42</sup>, or to New Philanthropy Capital’s Journey to Employment Framework. The framework provides guidance and sample indicators “to help charities think through how their work contributes to young people’s employability, and plan approaches to evaluation”<sup>43</sup>.

## Examples: current measurement practice

Exhibit 18: Input, output and impact KPIs related to content, used and reported across Responsible Media Forum companies



<sup>42</sup>London Benchmarking Group, (The LBG Framework)

<sup>43</sup>NPC, (The Journey to Employment (JET) Framework)

To demonstrate how this approach looks for the media sector, the graphic shows a range of content-related KPIs used in recent years by Responsible Media Forum companies over recent years, split into those that measure inputs, outputs and impacts.

**Dentsu Aegis Network** is part of an initiative, Brands for Good, which brings together marketers and brands to encourage consumers to adopt nine sustainable behaviours. These behaviours combine both societal and planetary needs with consumer research that indicates which messages the public are most likely to respond positively to – and ultimately change their behaviour<sup>44</sup>. “This is fundamentally reimagining the way brands create value and engage with customers around sustainable living” says Alexandra Lima, Social Impact Manager, Dentsu Aegis Network.



Since 2013, we found evidence of a number of media companies measuring their brainprint through robust impact metrics. For example, BBC’s ongoing impact research project (see case study below), and RCN Colombia’s partnership with USAID to support reconciliation amongst Colombian citizens after the Government’s controversial peace agreement with former FARC rebels (see case study).

Measuring the impact of content is easier against a pre-defined social intent or mission. So, a media company looking to measure its content impact is likely to start with a central issue. This might be the flagship sustainability campaign or ‘hero issue’. For example, ITV’s partnership with supermarkets to support healthy eating by driving up sales of fruit and vegetables. If the mission is to weave a topic, say, climate change into all content, the complexity of the measurement challenge increases exponentially.

Certain topics and sub-sectors have already presented opportunities for collaboration on impact measurement. On diversity and inclusion, the UK broadcasters are working together to track how representative they are, both in their content and amongst their off-screen workforce. ‘Project Diamond’ has published its first disclosures based on this long-running data gathering project<sup>45</sup>.

**ITV’s Eat Them To Defeat Them** campaign has led to a 2.3% increase in vegetable sales as kids were encouraged to eat their veg. Not an easy achievement for an otherwise flat product!<sup>46</sup>

**Virgin Media** has partnered with Scope to create the **#WorkWithMe** campaign, aiming to support 1m disabled people in getting into and staying in work by the end of 2020, through a nationwide awareness campaign, an online hub aimed at disabled people, and advocacy to industry and government.<sup>47</sup>

<sup>44</sup>HM: SB Brands (2019), (The Pull Factor Project Report)

<sup>45</sup>Creative Diversity Network (2017): (‘Diamond – The First Cut’)

<sup>46</sup>Susie Braun, presentation at Mirrors or Movers VII, 18 September 2019, London

<sup>47</sup>Virgin Media, (‘How Virgin Media is helping disabled people into the workplace’)

## Towards a framework for credible content impact disclosure

Over the course of 2018 and 2019, the Content Impacts Working Group (a sub-set of the Responsible Media Forum) has been exploring good practice in measurement, and the potential viability of a shared framework for measurement. Through research and a series of workshops, the group produced a template for what credible public disclosure on content impacts would look like. It is intended to be used in connection with major single-issue campaigns – flagship initiatives – as opposed to more subtle content strategies. The template follows five general disclosure principles that apply generally to non-financial reporting and is structured around nine questions. As such, it is an ideal standard of reporting that is probably unattainable in the short term, but then again the importance of and expectations around non-financial reporting in general have arguably developed beyond anyone’s expectations over the last 5-10 years.

Guiding principles	Questions	Background
Inclusiveness	Which experts did you consult when selecting and developing the campaign and how were they engaged in the process?	More often than not, major campaigns will be developed in partnership with scientific bodies or NGOs to ensure the topic is pertinent and the messaging is relevant and credible.
Context	What’s the significance of the campaign topic (evidence)? Was the campaign focus area supported by or extended to other (internal) activities, e.g. training of colleagues or operational changes?	In the past, philanthropic efforts often suffered from a degree of randomness in how they were chosen. These questions seek to establish the importance of the topic, the fit with the media company and how it was supported by internal capacity-building and initiatives.
Balance	Were core messages of the focus area/campaign contradicted by or at odds with other content produced or disseminated by you?	Just like other industries face regular accusations of white- or greenwashing, it is important for any campaign to be somewhat aligned with other content impacts and editorial positions.
Comparability	What was the format, reach and duration of the campaign? What were the impacts achieved as a result of the campaign? (qualitative and quantitative)	This is the section to describe inputs, outputs and impacts achieved as a result of the campaign, ideally using a mix of hard and soft measures.
Accuracy	How did you verify the accuracy and robustness of the information reported?	It is commonplace for other non-financial disclosures to be verified to particular levels and standards. While there is no established standard for content impact disclosures, it is good practice to describe the methodology used to ensure the credibility of the information provided, particularly around inputs, outputs and outcomes (see section above).



# CASE STUDY:

## BBC<sup>48</sup>

### How did your work on content impacts start?

BBC Audience Research was inspired by the [European Broadcasting Union's 'Public Service Media Contribution to Society'](#) workshops in 2015. Additionally, the BBC Charter Review for 2016 asked the BBC to show it is delivering its public purpose, is distinctive in an increasingly crowded market, and can evidence its impact on audiences. Although the BBC had plenty measures of consumption and appreciation, it lacked consistent measurement of the impact of its content on the audience's lives.

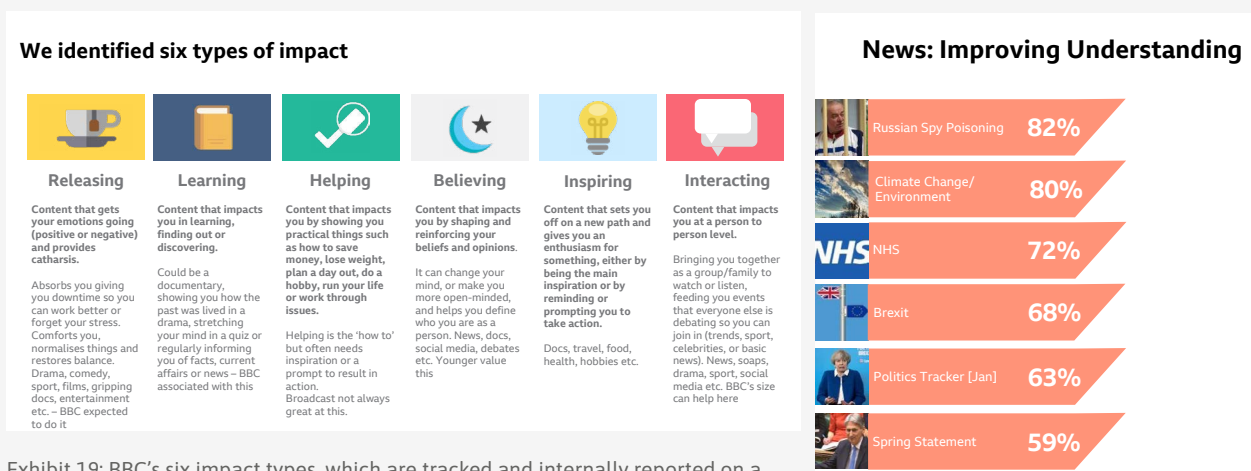


Exhibit 19: BBC's six impact types, which are tracked and internally reported on a regular basis; and results of BBC's regular Pulse surveys ranking content by how much it improved viewers' understanding

### What have been the key impacts?

Through our work on measuring the impacts of our content on BBC audiences, we have developed a good understanding of several key programmes' impact. Notable examples include:

- Blue Planet II: Our Blue Planet (final episode) aired to audience of 11.9m. 62% of viewers agreed that they intend to change day-to-day behaviour to reduce their impact on the oceans, and 79% felt inspired by the programme. Online searches about plastic recycling surged by 55% and charities such as the Marine Conservation Society and World Wildlife Fund saw increases in traffic to their websites of 35 - 169%.
- Stacey Dooley Investigates: Fashion's Dirty Secrets had an average audience of 2.1m, 26% of which said they thought of changing their behaviour after watching.
- Domestic abuse storyline in the Archers inspired a fan to set up a JustGiving page, raising £122,535 for Refuge, a domestic violence charity. The programme is cited as the reason for a 17% year-on-year increase in calls to the national domestic violence helpline.
- The Black and British season, which ran across BBC TV, Radio and Online in 2016 had a notable impact on those from Black ethnic backgrounds. 42% of those reached said it connected with them and their experiences; 46% said it taught them something new; and 67% said that having such a season made them feel more positive towards the BBC.

<sup>48</sup>The content of this case study is mainly derived from a presentation by David Bunker, Head of Audiences (BBC Television), to the RMF at a meeting on 3 December 2019, London.

- The mental health season, a pan-BBC initiative coinciding with the UK 2019 Mental Health Awareness Week, caused spikes in contacts to the BBC Action line, Public Health England support pages and charity Mind. 80% Of the audience reached claimed to feel confident in knowing how to get help.
- Stargazing Live's coverage of Tim Peake's lift-off to the International Space Station prompted 9,021 volunteers help the University of Manchester to go through 6 years worth of pulsar data in just 3 days. 53% of the audience said they learnt a lot, and 18% said they did something new as a result of watching.
- Peaky Blinders has been named as the reason 2.5% more people visited Birmingham in 2018 compared with 2017, as well as that 'Arthur' surged into the top 10- boys' names for the first time since the 1920s, and 'Ada' made the same jump for the first time in a century too.

### **Were there any challenges on the way? What were they?**

Robustly measuring actual behaviour change and attributing that change to a specific piece of content is not something a media organisation is well-set up to do. That kind of scientific rigour is for academics! However, media organisations can take actionable steps to get better at measuring impact: modify routine surveys, add impact questions into ad hoc surveys, ask audiences to rate the BBC and other providers on impact and ask for specific examples, seek out wider metrics such as google search patterns, social media mentions, helpline contacts, pledges, app downloads, amongst many other possible metrics.

### **What's next for BBC Audience Research?**

We will aim to more consistently track interest, engagement, and appetite to see if anything shifts in response to certain content. We will also survey a sample of the sign-in base at periodic intervals to track changes in claimed behaviour and attitude and compare to signed-in behaviour – in effect setting a baseline of audience behaviour and tracking changes over time. There will also be more ad hoc pop-up surveys around key pieces of content, to capture claimed impact in the moment.

### **If you could give one piece of advice to media companies wanting to use content as a plank of their responsibility strategy, what would it be?**

Create an 'impact culture'. Capture evidence of impact, and share that across the organisation. Measure, share, celebrate, and learn from best practice. This will ensure that measuring, considering and embedding audience impact will be valued across the organisation.

# WHERE NEXT?

In our 2013 report, we suggested that media companies would soon look to more proactively manage the societal impacts of their content. Based on our latest research and our ongoing discussions and work in the media sector, it's clear that the 'brainprint' has indeed risen in importance, with greater sophistication in measurement and management of impacts.

In many cases we see greater confidence and proactivity, greater rigour in measurement, tight topic-focus via single-issue campaigns, and meaningful collaborations with expert partners that lend their credibility and real-world experience of the issue at hand.

The rise of the dual pledge is also good evidence of the increasing recognition and understanding of the brainprint. Specifically, dual pledges entail a simultaneous commitment to internal, operational changes (such as eliminating single use plastics on campuses) alongside a content commitment (such as training all editorial staff on the circular economy or setting a content target relating to the coverage an issue receives at events, in publications or on screen).

We've seen a greater range of KPIs being applied to this rather nebulous topic, suggesting that the way forward will involve yet further rigour, perhaps moving towards the maturity that other sustainability topics enjoy.

External interest in active management of content impacts by media companies has grown. The picture is not consistent, though, and there remains reticence from a range of stakeholders about the extent to which media companies ought to marry content with sustainability concerns. By putting greater emphasis on positively impacting society through content, do media companies risk becoming campaigning organisations, eschewing the editorial impartiality or balance that is embedded in many media companies' social contract? Several interviewees expressed concerns.

So, as proactive management of content impacts advances and becomes more widespread, our recommendation is to proceed with great care. Apply best practice, choose partners carefully, and bring in experienced professionals with skills in sustainability, research and content creation.

To reinforce this, we have distilled what we heard from Responsible Media Forum companies into a simple guide for good practice in creating impactful content. Media is a diverse sector, with companies affecting culture and relating to audiences in a range of ways, so the picture looks a little different in each sub-sector. For simplicity, the six steps take a high level view across all sub-sectors, focusing on the areas they have in common.

# SIX STEPS TO IMPACT IN RESPONSIBLE CONTENT

1

## Set the intent

For those leading the responsibility agenda at a corporate level, clearly defining the mission makes meaningful and measurable content impact more manageable. A focused theme or campaign makes it easier to engage senior stakeholders and employees in, better enables target-setting and progress-tracking, and helps build a clear narrative for external recognition. Media responsibility leaders who do this well are adept at avoiding mission creep, and focus efforts on winning the hearts and minds of senior stakeholders, and enabling colleagues to deliver the impact for you.

2

## Ensure diversity in every step of content creation

Homogenous teams bring a narrower set of perspectives, and the risk of tone-deaf content. To create content that really reflects and resonates with a broad view of society, ensure diversity at each step of the content-making process – from academics, researchers, writers and creatives, to commissioners, directors and editors, to producers and distributors.

3

## Know the value of expertise

Whatever your mission, ensuring content makers are appropriately knowledgeable and informed is key. Of course, it's not practical for everyone to have deep subject-matter expertise, and to some extent the sustainability function can fill this role. So, this is partly about sharing the existing knowledge in the organisation (and especially responsibility and sustainability specialists), and partly about applying appropriate levels of rigour to ensure content quality. One sub-sector is far advanced on the latter – academic and education publishers' model is characterised by a rigorous approach to content quality, with content produced by experts and a robust peer-review process applied. In other sub-sectors, knowing the value of your expertise (and maximising it) might be practically embedded in the following ways: - conducting expertise audits, providing resources and training on key issues, and ensuring that existing pockets of expertise are identified and shared.

**4**

### **Partner strategically**

Our research showed that media companies with the most leading-edge approaches to content impacts were putting partnership at the centre of their approach. Developing ongoing, meaningful relationships with subject matter experts who feel able to challenge the way content is being made, helps to ensure that sensitive topics are approached in an informed and appropriate way, reflecting real-world experiences and latest best practice. In some cases media content is developed by experts (such as education and academia), but in many other contexts partnerships are a way to 'import' leading edge knowledge.

**5**

### **Measure impact**

Though measuring content impacts is difficult, there are more and more examples of meaningful KPIs put in place. By defining these in the early stages, and ensuring at least some measure impact (rather than inputs or outputs), media companies will be able to better articulate and demonstrate the important role they play in society, and the role of the responsibility function in driving this. There is also a wider benefit to investing in impact measurement. Such insights create dialogue with consumers, helping ensure that the organisation is aware of and understands the effect they are having.

**6**

### **Follow up on impact**

In our research, we saw a few examples of media companies measuring the impacts of specific pieces of content and campaigns after their distribution, but this is not the sector norm. Most exceptions came from longer term campaigns and partnerships. To understand how enduring content impacts are, build in time and resources to follow up on impact, as is the established good practice in social research and international development. In our view, this would be a valuable area for investment, especially – given resource constraints, for priority or 'hero' issues.

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**Anna Lungley**, Global Head of Social Impact, Dentsu Aegis Network

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**Christiana Figueres**, Founding Partner, Global Optimism

**Christopher Snowden**, Head of Lifestyle Economics, Institute of Economic Affairs

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**Siena Parker**, Head of Corporate Responsibility, Penguin Random House

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