



# Sustainability

**How are sustainability topics placed  
in the German advertising market**

An analysis of advertising expenditure  
in the time period January 2022 - May 2023

July 2023

# What was analyzed?

- **Basis:** Nielsen Ad Intel Germany
- **Methodology:** Keyword Analysis
- **Time period:** January 2022 – May 2023
- **18,000+** motifs
- Media genres:  
**TV, print, radio, OOH, direct mail, cinema, online**
- Selected **social media** creatives



# What is sustainability?

The media insights are based on a **keyword analysis** of the advertising campaigns recorded by Nielsen.

## Selection of relevant keywords



#C02-footprint	#green button
#climate balance	#recycling
#climate friendly	#renewable
#climate protection	#reusable
#climate change	#solar power
#eco-electricity	#sustainable
#eco test	#wind energy
#energy transition	#...
#environment	

## Definition

The individual classification “**Sustainability**” includes all advertisements that address sustainability issues. By sustainability we mean using the **Earth’s resources responsibly**. This means not consuming more than can be regrown.

Campaigns, which only address aspects of social sustainability (e.g. fair trade), the use of natural ingredients, vegan food, animal welfare or economic sustainability, are not included as such.



The definition can be adjusted for each project according to the **customer’s needs**.

# Media Insights about sustainability

January 2022 – May 2023



# Example motifs with sustainability relevance

January 2022 - May 2023 on TV

## Henkel

### Persil Power Bars



The commercial claims that the Persil Power Bars are small, powerful and sustainable and that using the bars can save up to 97% plastic.

## Ikea

### Image



The ad shows a man using an Ikea bag while shopping. This is made of 100% polypropylene. The ad finishes with the statement "Of course sustainable".

## Amazon

### Image



Amazon is constantly developing projects for the use of renewable energy. For example, one of the largest solar projects in Europe, which supplies Amazon's production processes.

# Top industries with sustainability relevance

January 2022 - May 2023



## Cleaning

142.8 MEUR

### Top categories

Detergent, cleaning and household care



## Services

111.6 MEUR

### Top categories

Corporations, online services and platforms



## Body care

92.4 MEUR

### Top categories

Hair and facial care  
Personal Hygiene



## Finances

90.6 MEUR

### Top categories

Investments, services and private-clients



## Energy

69.6 MEUR

### Top categories

Energy supply, energy and heating technology

# Media usage

January 2022 - May 2023



## Where was advertising in Social?

1. Facebook mobile
2. Instagram mobile
3. Facebook desktop
4. Twitter mobile



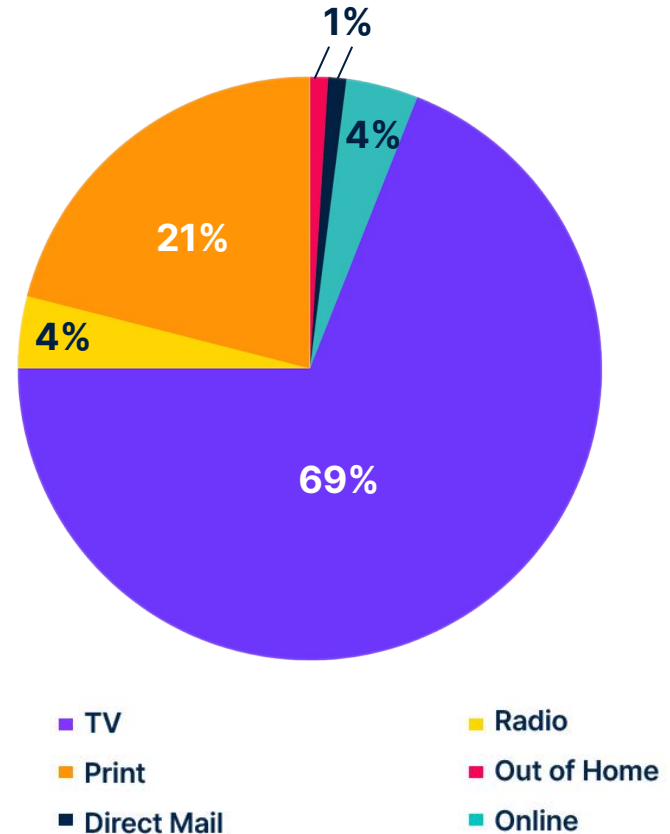
## Share of Print advertising expenditure...

- 45% in newspapers
- 43% in magazines
- 12% in journals



## Share of TV advertising expenditure...

- 92% in private TV stations
- 4% in Pay-TV channels
- 4% in public broadcasters



# Which attributes were used in communication?

January 2022 - May 2023



## Plastic reduction

Henkel, Ikea  
Love Nature



## Solar power

Amazon, Enpal  
Be Around



## Saving energy

Bm. f. Wirtschaft  
& Klimaschutz,  
Procter & Gamble



## Climate neutral

Hipp, Ionity



## Saving water

L'OREAL, Reckitt  
Netze BW



## Fuel savings

Google, Renault



## Sustainable Investment

Dt. Sparkasse  
Dt. Kreditbank  
Zurich Versicherung



## Recycling

Iglo, LIDL,  
Michelin

QuelleSource: Nielsen Advertising Statistics Germany, Special classification: Sustainability



# Strategy trends

## Yello

### Concrete



A concrete sustainable product is advertised.

## DKB

### Bank



The consumer benefits from sustainable action "close to the product".

## Amazon

### E-commerce



The company behind the advertised product strives to act sustainably.

# About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future. Nielsen operates around the world in more than 55 countries. Learn more at [www.nielsen.com](http://www.nielsen.com) and connect with us on social media (Twitter, LinkedIn, Facebook and Instagram).

## Your Contact



### **Fernando Reimann**

Manager Analytic Consulting & Media Insights

Phone: +49 173 6535585  
[fernando.reimann@nielsen.com](mailto:fernando.reimann@nielsen.com)

Nielsen Media Germany GmbH  
Sachsenstr. 16  
20097 Hamburg  
[nielsen.com](http://nielsen.com)

