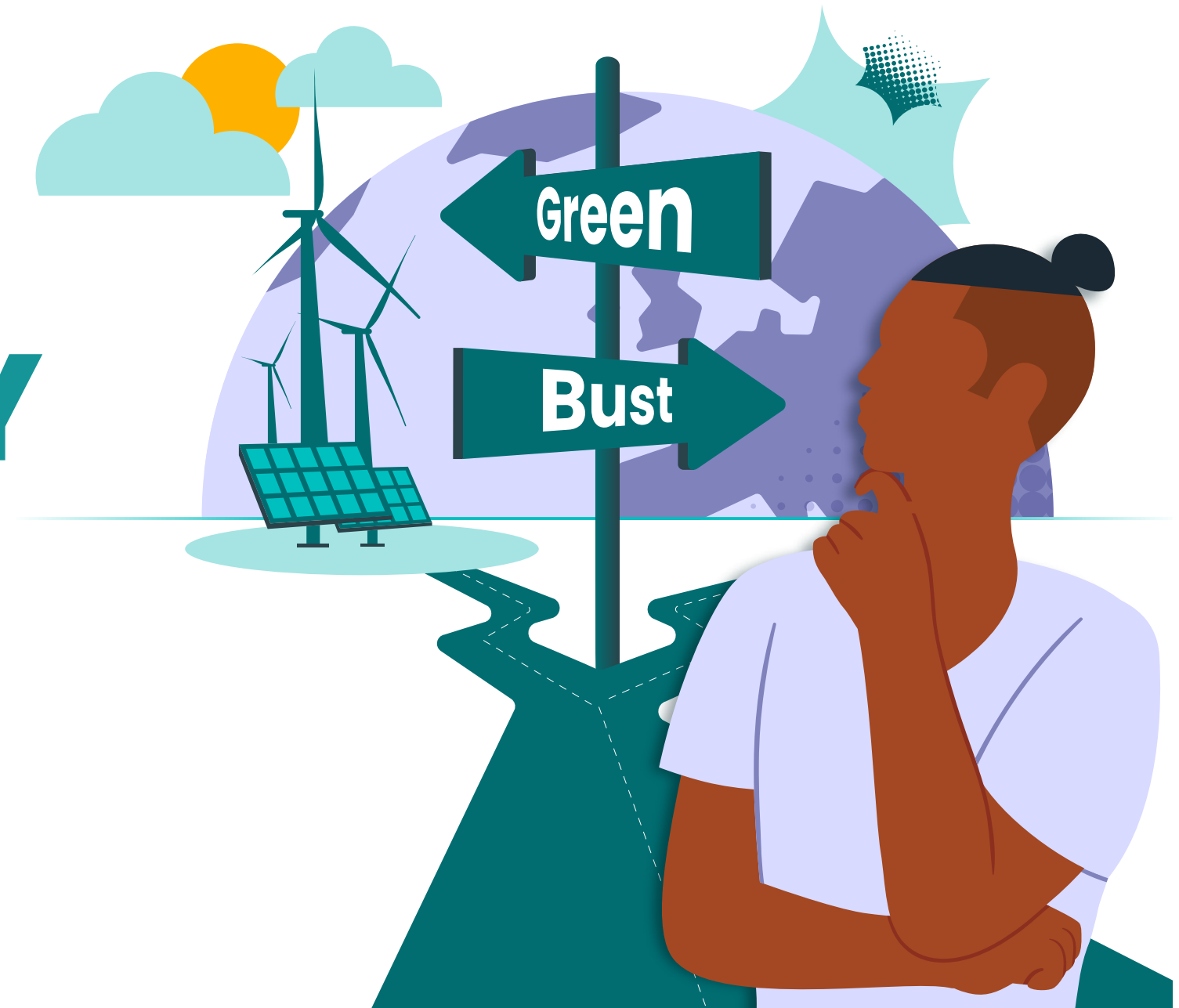


THE NATIONAL

# AGENCY SUSTAINABILITY REPORT 2023



Nimbus

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# OVERVIEW



# Executive summary

## Ushering in a new era of eco-conscious growth

It's a pivotal new era of eco-conscious growth. Agencies stand divided between pioneers and late adopters. Pioneers embrace environmental sustainability, late adopters remain to be convinced by the commercial benefits that sustainability holds for them.



This report revealed a stark truth: sustainability ranks among the top three agency client priorities, behind only 'quality of service' and 'value for money'. Clients are being pushed by their own customers to be more eco-friendly. This has caused a sustainability performance gap to emerge, resulting in clients progressing to a more advanced stage in their sustainability journey than agencies.

Shockingly, our research found that, typically, agencies who fail to prove their commitment to sustainability within the next 12 months will be fired by their clients.

In short, this report points to a worrying number of agencies that are potentially sleepwalking into oblivion because clients:

- See them as being out of touch with the industry (late adopters)
- Withhold new opportunities as they choose to work with pioneering competitors
- Accuse agencies of greenwashing as they fail to demonstrate a deep commitment to developing their sustainable practices

However, there is still time to take action. This report identifies that agencies must:

- Re-evaluate their current sustainability strategy or, if they're late adopters, create one
- Offer low-carbon solutions in order to differentiate their businesses
- Choose a sustainability certification that works for your agency and your client(s)

In short, agencies must **Grow Green** or **Go Bust**.

**Tim Dunton**

Founder, Nimbus Hosting

# Methodology

## Report goal

The goal of this report is to help the UK’s agency leaders understand how sustainability can provide a gateway to new sources of business growth and client retention.

We, therefore, explore the opportunities and threats facing agencies as they attempt to integrate the sustainability triple bottom line of People, Planet, and Profit.

## Our surveys

Two surveys were open during June and July 2023. The targeted surveys were created specifically for agencies and for clients of agencies. The surveys were distributed to respondents across the UK.

During this period, 71 agencies completed the agency survey and a further 100 clients completed the agency client survey.

### Survey 1: Agencies

The first survey delves into how agency leaders like you feel about going green, what they’re currently doing, and what they aim to achieve in the near future. This survey aims to explore the perspectives of agencies on adopting environmentally sustainable practices, assess their current efforts, and understand their future goals and aspirations related to sustainability.

### Survey 2: Agency clients

The second survey quizzes agency clients about what they want to see from agencies, how important they consider sustainability credentials to be, their views on B Corp, and how heavily the issue of sustainability practice influences their buying decisions.

## The benefits of this methodology

The results of these surveys contribute to a comprehensive understanding of the sustainability landscape within the agency sector. They empower leaders to make informed decisions that drive positive changes and foster closer alignment with their clients for long-term growth.

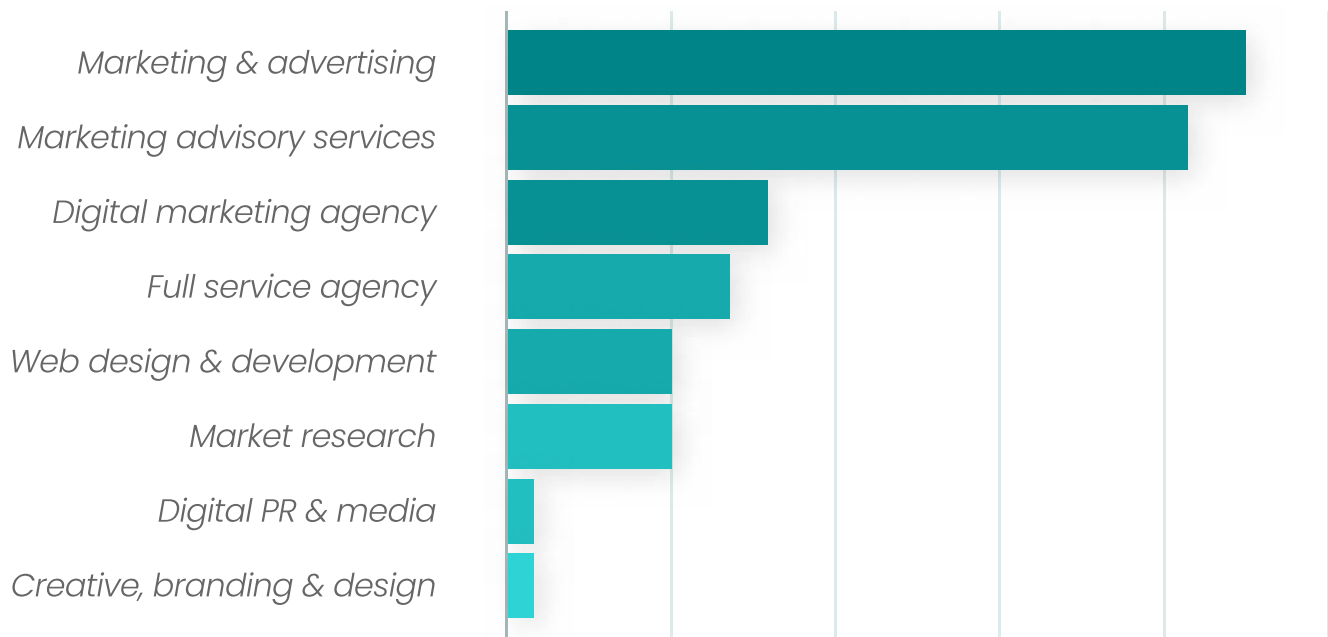
# The respondents: Agencies

## Agency demographics

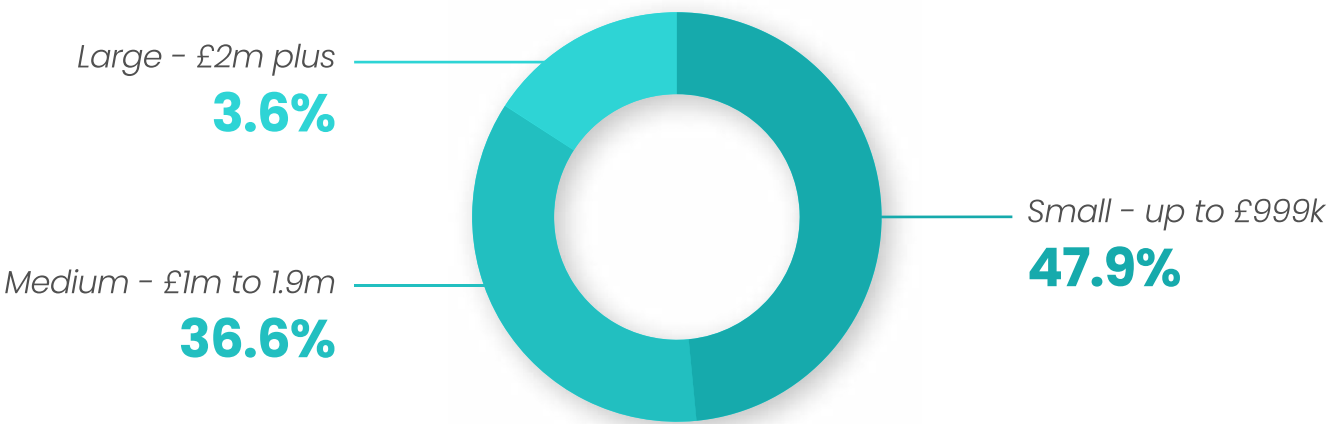
A good range of agencies participated in the agency survey, with **Marketing & advertising** (32.4%) and **Marketing advisory services** (29.6%) being the most popular. **Digital** (11.3%), Full service (9.9%) and **Web design & development agencies** (7%) completed the top five respondents.

In terms of turnover, there was a good distribution of agencies. 48% of agencies are small, operating within the £0 to £999k range, while nearly 37% of agencies were medium sized, operating within the £1m to £1.9m range. 16% of agencies were large, operating at the £2m plus range.

Agency categories



Agency turnover



# The respondents: Agency clients

## Agency client demographics

All respondents to the agency client survey are decision makers when it comes to marketing their businesses.

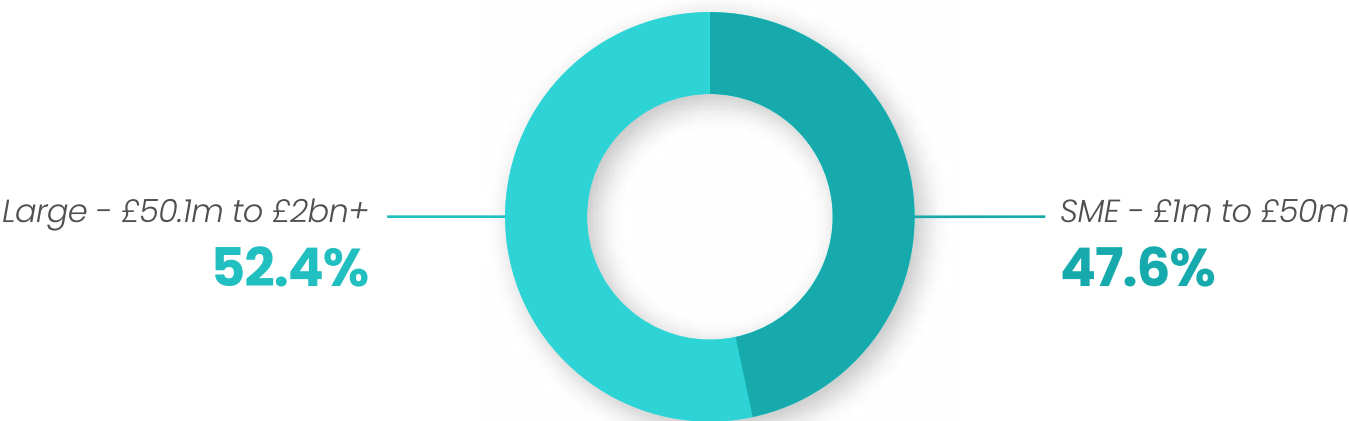
There was an almost equal split between SMEs (47.6%) and large companies (52.4%).

For the purposes of the survey, we defined SMEs as turning over £1m to £50m. Furthermore, we've categorised those companies turning over between £50.1m and £2bn plus as large organisations.

Most popular outsourced services



Agency client turnover





# Introduction

In a first-of-its-kind national report on sustainability for the UK agency sector, agency leaders will learn about the current state of sustainability integration within their industry.



With UK PLCs focused on environmental, social, and economic considerations – the triple bottom line of sustainable supply chains – this report uncovers potential areas of opportunity and threats that the nation’s agency leaders face as the UK economy continues its relentless march towards a net-zero future.

By examining both agencies and their clients, this groundbreaking report enables agency leaders to gain actionable insights, benchmark their efforts against the market, and strategically position themselves in an increasingly eco-conscious marketplace.

For several years, Nimbus has been at the forefront of environmental and social sustainability. We’re a carbon-neutral company and support various green and social initiatives. We help other businesses do the same.

In turn, we’ve built a bedrock of expertise that has helped inspire many agencies to navigate their sustainability challenge. We hope this report does the same for you.

Finally, we’ve gone a step further to enhance the report’s practicality. We engaged three experts who specialise in working with agencies, seeking their insights on the report’s implications within their realm of expertise.

**Claire Hutchings** provides us with the marketing view, **Janusz Stabik** offers his advice from an agency perspective, and **Neil Russell-Bates** provides expert commentary through the sustainability lens.

**Mike Crook**

Managing Director, Nimbus Hosting





Claire Hutchings



Marketing Consultant, Chime Agency

Claire is an award-winning marketing consultant and founder of Chime Agency. She helps agencies and consultancies turn up the volume on their own marketing strategy.

With an impressive decade-long career working with agencies, Claire is a sought-after expert, with deep specialist knowledge on building an agency brand and, crucially, generating new business leads.

Having left Publicis Groupe after six years as Head of Marketing for MSL, she now supports agencies of all shapes and sizes with their marketing requirements, on a freelance and contract basis.



Janusz Stabik



Managing Partner, GYDA

Janusz is a Managing Partner at GYDA, a specialist growth consultancy for digital agency leaders.

He's an agency founder, international keynote speaker, and lead coach for various Google coaching programmes across EMEA.

GYDA Mastermind groups and 1-2-1 coaching programmes help agency leaders run better businesses and support the lifestyle they wish to live.



Neil Russell-Bates



Sustainability Consultant, Hilltop Consulting

Neil is a highly sought-after sustainability consultant, who specialises in guiding organisations towards their green objectives. He holds certifications in SECR and Scope 3 carbon accounting.

Neil leads Hilltop Sustainability, focusing on various sustainability strategies, including carbon footprint reduction.

Additionally, he co-founded Sustaineers Consultants, a coalition of 14 sustainability experts dedicated to promoting a net-zero economy.



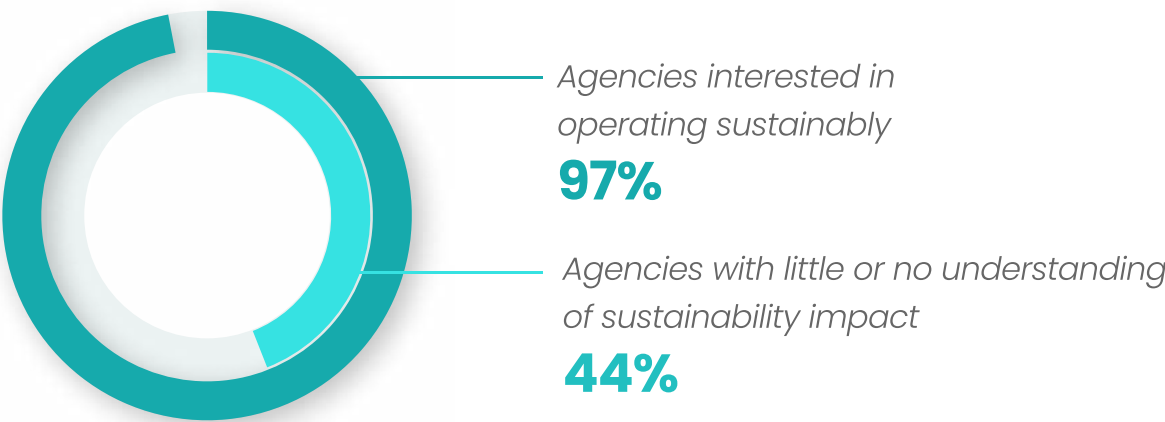
# THE AGENCY PERSPECTIVE

We wanted to understand agencies' current approaches to sustainability, their progress, challenges, and successes. This approach will enable agency leaders to highlight areas for potential improvement as they navigate this new eco-conscious era.

# UK agency landscape: A look at sustainability progress

Our research found that **97%** of all agencies expressed an interest in operating in an environmentally friendly manner.

However, **44%** of agencies say they have little to no understanding of the impact that sustainability would have on their business.



“An emphatic 97% of agencies are resolving to adopt environmentally sustainable practices within their operations

# Large and medium agencies have a better understanding of sustainability

Developing a strong understanding of sustainability is crucial for agencies looking to take advantage of new business opportunities.

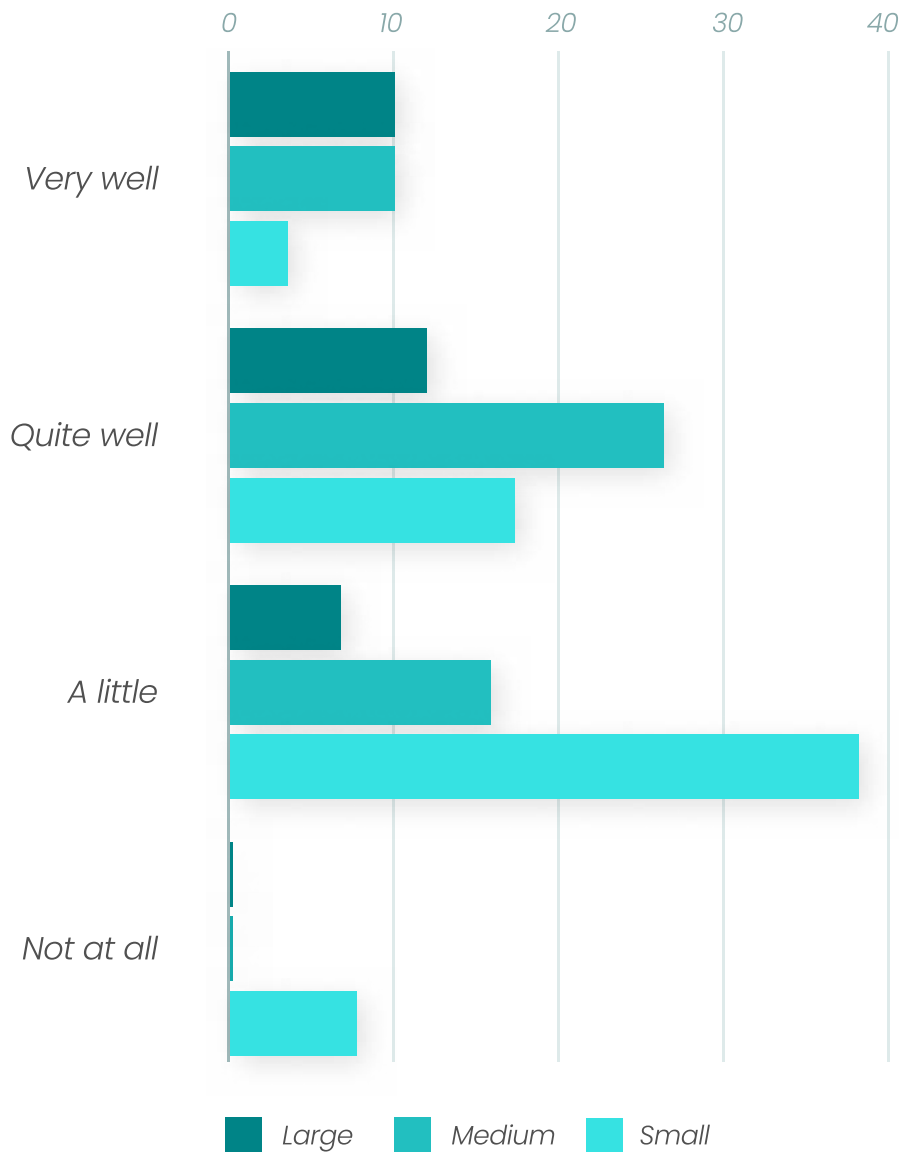
“  
73% of large agencies understand the impact of sustainability on their business

Our research found that **73%** of large agencies feel that they understand ‘quite well to very well’ the impact of environmental sustainability and sustainable practices on their business. Conversely, **27%** feel they have little understanding of the impact of sustainable practices on their business.

A similar picture emerges with medium-sized agencies, where **69%** feel that they understand ‘quite well to very well’ the impact of environmental sustainability and sustainable practices on their business. **31%** feel that they have little understanding of its impact on their business.

Interestingly, only **41%** of small agencies feel that they understand ‘quite well to very well’ the impact on their business. Worryingly, **59%** feel that they have little understanding of the impact of sustainability on their business.

Agency understanding of sustainability

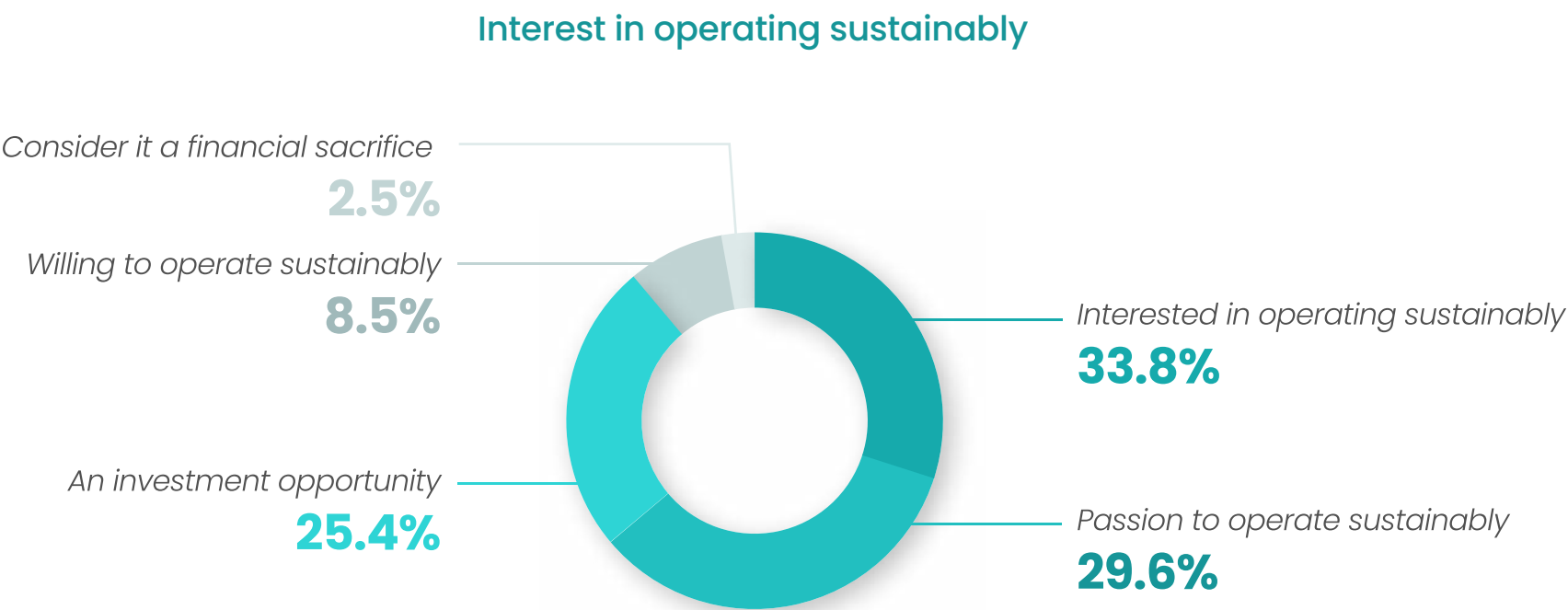


# Strategy outlook: Working towards a net-zero future

## Agencies embracing sustainability

The data suggests that agencies are embracing environmental sustainability with positivity. Specifically, **33.8%** of respondents are 'interested' in operating sustainably, while nearly **30%** are 'passionate' about changing to a more sustainable future.

**25%** see sustainability as an investment opportunity. These are the innovators of the agency sector and will be the first to grow market share in this space. Only **3%** of respondents regard sustainability as a 'financial sacrifice'. The majority of agencies see the financial viability of sustainability as a profit centre.



“ One in four agencies actively perceives sustainability as a compelling investment opportunity

## Sustainability strategy: Current state versus future state

While agencies are embracing sustainability, creating and executing a highly effective sustainability strategy is the key driving force behind sustainability success. We asked agencies on a scale of 1-10 (10 = highest), how environmentally sustainable they would like to be by 2026.

Despite **35%** of agencies setting a vision to score the top mark of 10 in three years' time, our survey revealed that in 2023, none of the agencies had assigned themselves the coveted top mark of 10.

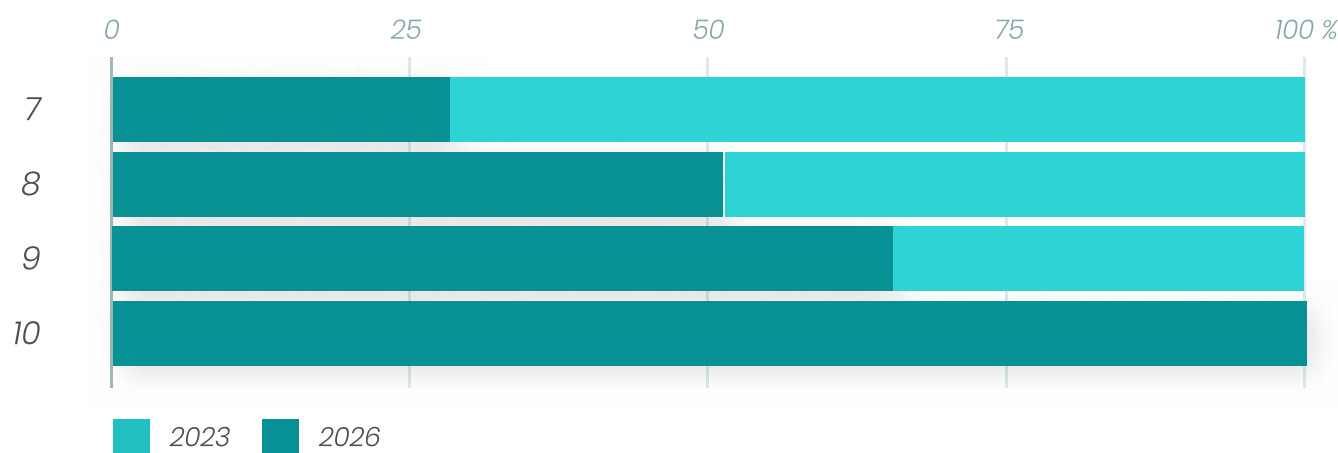
In 2023, **68%** of agencies had given themselves a rating of between 7 and 10, suggesting that they are making strong headway with their sustainability efforts. However, they are not satisfied. By 2026, our survey revealed that **92%** of agencies are expected to give themselves a rating of between 7 and 10, representing a **35%** increase in sustainability performance.

This indicates that sustainability will become a key battleground for agencies to win and retain business from clients.

Conversely, at the lower end of the scale, **8.5%** of agencies gave themselves a score of between 2 and 4. By 2026, they expect to achieve a minimum rating of 5 and above.

In short, the winds of sustainability change are in full motion for the entire agency sector. All agencies will need to adapt to thrive.

### Current state vs future state

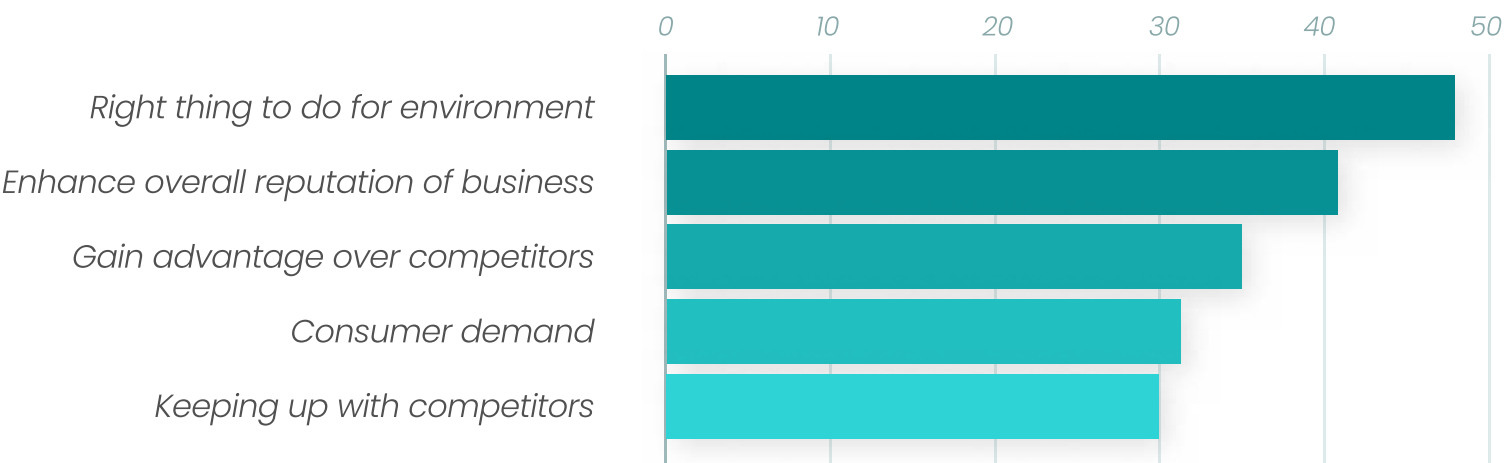




Top motivational drivers for powering an agency sustainability strategy

Motivations are the bedrock of a solid sustainability strategy. They help agencies to align their values, enhance their reputation, and attract eco-conscious customers – improving their long-term financial stability, as well as meeting the surge in environmental ambitions outlined in the previous section.

Top client drivers for choosing sustainable partners



“The driving force for 43% of agencies, is to curtail their negative impact on the environment

We asked agency leaders what their motivations are for implementing sustainable business practices in their agency.

Based on our findings displayed in the chart, the research uncovered the emergence of three key needs-based segments:

- **Eco-warriors:** Agencies who are motivated by their desire to reduce their negative impact on the environment **(43%)**
- **Customer champions:** Agencies who are motivated by meeting the sustainability criteria of their customers and clients **(32%)**
- **Tick-boxers:** Agencies who are motivated by their need to future proof against potential new environmental legislation **(11%)**

Each of these segments will employ unique sustainability strategies, in turn leading to new sources of competitive advantage for agencies who model these profiles.



**EXPERT INSIGHT**  
**JANUSZ STABIK**

*This is interesting, except we mainly witness two distinct groups: The first group, Eco-warriors, demonstrate a deep-rooted commitment to sustainability. Their leadership teams embody purpose-driven values, integrating sustainability into their agency's brand, proposition, client base, and recruitment approach. They actively seek collaborations with like-minded businesses, often holding B Corp certifications. This unwavering dedication fosters a transparent, sustainable image aligned with their founders' values.*

*Conversely, in the second group, we encounter 'Compliance responders'. These agencies respond reactively to external pressures, rather than having an intrinsic commitment to sustainability. They are pulled to make a change, not driven by it. They engage in surface-level efforts, such as pursuing accreditation, out of necessity rather than genuine passion for sustainability. They project a sense of purpose, while not delivering on their promise, and they often prioritise commercial success over sustainability. As a consequence, the messaging and the impact that they're creating is a little bit confusing and not that effective.*



**EXPERT INSIGHT**  
**NEIL RUSSELL-BATES**

*I would urge agencies to consider their motivations regarding sustainability carefully. Considering sustainability as a necessity to retain and attract clients or talent or to improve profits is a good enough way to get started. But experience shows that it will only get a business so far. Unless they can find a deeper motivation and engender that throughout their business, the medium to long-term sustainability strategy will flounder.*

**TALENT ATTRACTION**

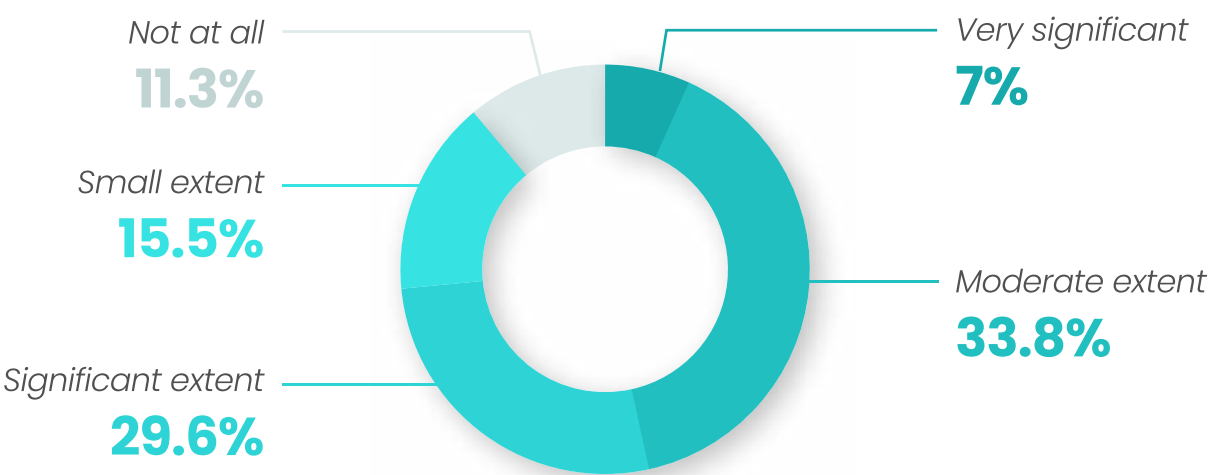
*Every business I know that has adopted a stronger approach to sustainability has reported back that this has come up as one of the deciding factors for new employees who choose to work for them.*

# Sustainability as a business growth driver

Profitability is important for sustainable business practices because it ensures the long-term viability of these initiatives.

Having seen that agencies embrace sustainability, it's no surprise that **89%** believe in the profitability power of green practices (aggregate of small extent to very significant). However, **11.3%** do not see the correlation between sustainability and profit. Significantly, all were small agencies. This suggests that small agencies are late adopters and are most at risk of losing out to the pioneering medium and large agencies, who express the strongest convictions for the profitability potential of sustainability, at **81%** and **91%**, respectively.

Belief that sustainability makes company more profitable



**EXPERT INSIGHT**  
**NEIL RUSSELL-BATES**

*The report provided a few surprises. I was taken aback to see that, for many agencies, long-term profitability and talent attraction weren't key motivators behind their sustainability strategy. This is surprising because the evidence from my own clients and other studies shows that these are two of the key benefits of adopting a good sustainability strategy. Adopting carbon reduction policies and other practices helps improve the long-term cost base, and thus, profitability.*

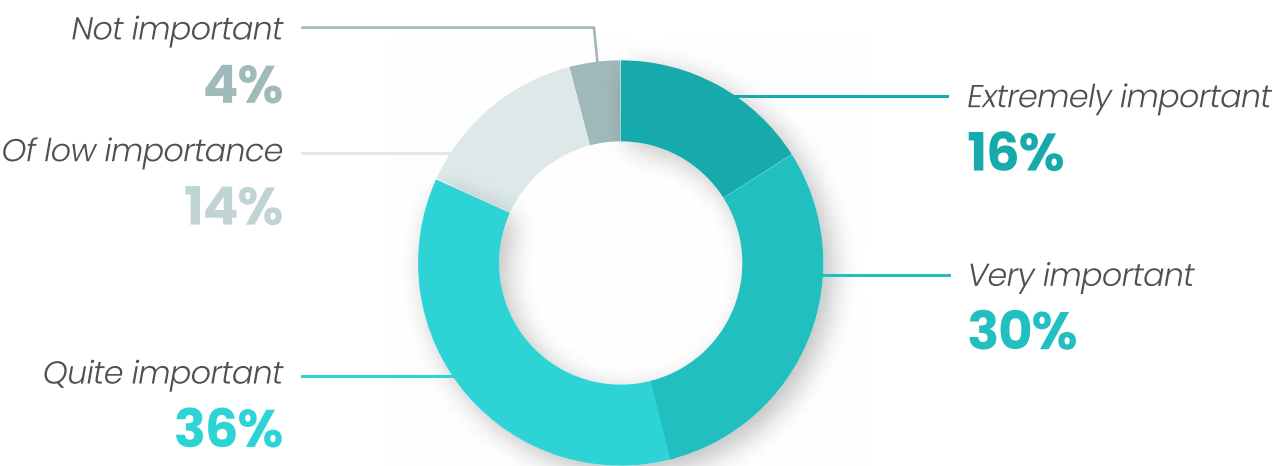
## Sustainability credentials: A strategic lever for growth

Given that agencies recognise the growth potential of sustainability, this section explores whether their sustainability credentials have led to new business wins.

When it comes to an agency's perception of whether sustainability credentials are important to clients, not surprisingly, **82%** of agencies believe that they are.

However, worryingly for those who perceive green credentials as of low or non-importance to clients, **62%** of these respondents are small agencies. This further confirms that the small agency market are late adopters. On the other hand, **47%** of medium-sized agencies say they are important, confirming their pioneering role in the sector.

Perceived importance of sustainability credentials to clients



“ A resounding 82% of agencies recognise the pivotal importance of sustainability credentials to their clients



**EXPERT INSIGHT**  
**JANUSZ STABIK**

*I ratify these findings. In my expert assessment, it is evident that a significant portion of the agency market faces a common challenge. Approximately 85% of global agencies have a headcount of up to 10 or 12 employees. This seems to represent a glass ceiling for many small agencies, hindering their ability to grow beyond this point.*

*Growth necessitates increased overhead costs, demands for management and leadership capabilities, higher salaries to attract top talent, and subsequently, a reduction in profitability.*

*Against this background, for many of these agencies, sustainability becomes a secondary priority, irrespective of whether they originally had a sustainability focus or purpose.*

*Their mindset often revolves around the idea that once they break through this growth barrier and reach around 20 employees, their profit margins*

*will be substantial enough to allocate resources and investments towards sustainability initiatives.*

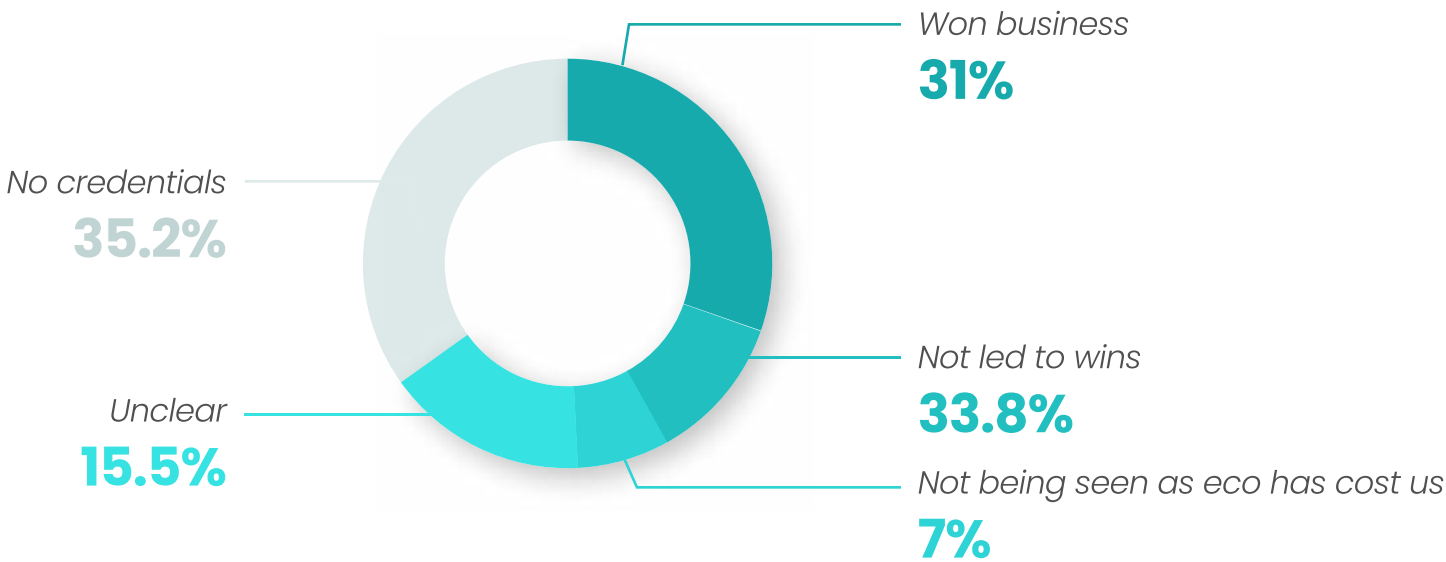
*In essence, sustainability takes a backseat, with the hope that it will become a priority at some point in the future. This delay in addressing sustainability is more prevalent among smaller agencies that have not consistently maintained profitability as they prioritise short-term financial concerns over sustainable practices.*



## Winning business

Our research found that agencies have begun to seize the green advantage, with **31%** claiming to have won business on the back of their green credentials. Not surprisingly, those ‘winners’ are dominated by large and medium-sized agencies turning over £1.6m plus per year.

Belief that environmental status or certifications have won agency business



“For a significant 31% of agencies, green credentials have been a decisive factor in winning business

A further **7%** of agencies have claimed that not being seen as eco-friendly has cost them business.

Incredibly, **35%** of agencies have no green credentials. **64%** of ‘non-accredited agencies’ are small agencies, further cementing their late adopter status but also signalling deeper issues as to why this segment is trailing behind medium and large agencies.

Interestingly, **15.5%** of agencies are unclear if their credentials have led to wins, while another **11%** categorically state that it has not led to wins. Again, small agencies dominated these respondents.

These findings serve as a reality check for small agencies, suggesting a potential gap in understanding client priorities. This will impact client attraction and retention.



**EXPERT INSIGHT**  
**CLAIRE HUTCHINGS**

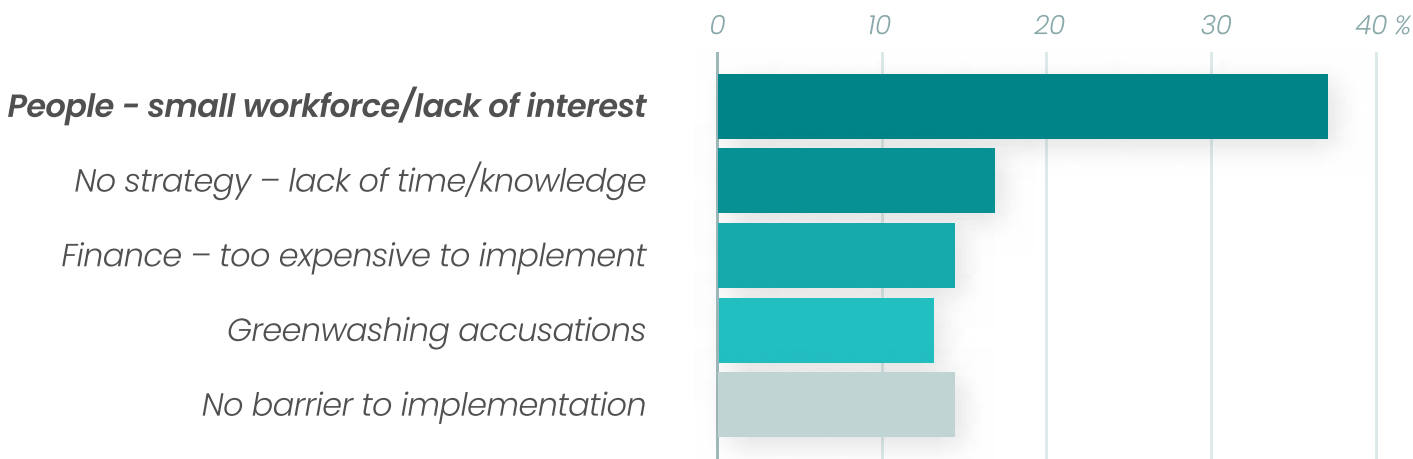
*If sub £1m agencies want to scale, they need to consider sustainability within their operations and marketing mix. Not only to contend with their larger counterparts, but to win larger clients too. Smaller agencies must operate more like their more established peers. They have the added advantage of often being founder-led and can therefore make quick decisions that will impact their growth without the bureaucracy and deeper-rooted cultural complications that may affect larger teams.*

Top 5 barriers to implementing a highly effective sustainability strategy

This section emphasises that agencies are struggling to overcome various barriers to reaching their environmental goals. The picture varies from the table when you deep dive into each segment.

- **88%** of small agencies face significant resource limitations with regards to a lack of strategy, workforce, and finance.
- **27%** of medium-sized agencies are worried about greenwashing accusations and hampered by team disinterest **(19%)**.  
There is a desire to avoid superficial sustainability practices.
- Large agencies report obstacles such as high expenses **(36%)**, limited workforce **(18%)**, and prolonged ROI **(18%)**.

Top 5 sustainability barriers



“A staggering 88% of small agencies grapple with severe resource limitations



**EXPERT INSIGHT**  
**CLAIRE HUTCHINGS**

Small agencies have the biggest opportunity to make a sustainable impact on their businesses. However, these agencies also struggle most with their marketing efforts, given their lack of resources, time, and budget. But what if they could align their marketing and sustainability goals to combine the two endeavours?



RECOMMENDED  
ACTION

It's important for agency leaders to understand the potential obstacles in their way and create strategies to overcome them.



EXPERT INSIGHT  
NEIL RUSSELL-BATES

*There comes a point where – unless your whole team are on board with why sustainability is so important to everything, not just business success – your progress will falter and the risks of falling behind increase quickly.*

*And you can't just expect everyone to be motivated by climate change, you will need to provide education via means of things like The **Carbon Literacy Project** or **Climate Fresk** to ensure you get buy-in.*

*Consequently, I would predict that whilst 'customer champions' may be quickest out of the blocks, the 'eco-warrior' companies will be the ones who reach the finish line in first place.*



EXPERT INSIGHT  
CLAIRE HUTCHINGS

*It is surprising to see that agencies perceive their workforce to be the largest barrier to fully investing in sustainability, given agencies tend to have a disproportionately young workforce, which at a macro level, shows most interest in purpose-driven initiatives.*

*Agencies should instead view investment in sustainable initiatives as a way to attract new, future-focused talent to their businesses. Get your sustainable operations and marketing strategy aligned to not only attract larger clients, but the team that will service them too.*

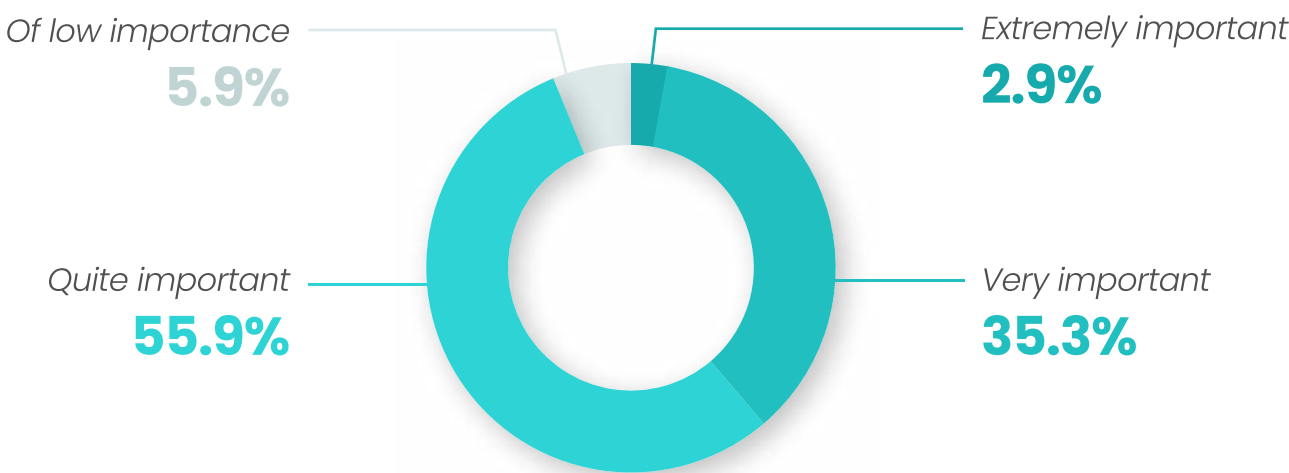
## Partnering with sustainable service providers

Partnering with sustainable service providers is important for agencies because it attracts eco-conscious clients, fosters innovation, and boosts positive environmental impact. **94%** of agencies deemed such partnerships as collectively important.

However, when taking a deeper dive into the dataset, **100%** of small agencies gave sustainability partnerships a relatively low rating of 'Quite important'. This once again highlights that small agencies have not bought into the green business revolution just yet.

Staying the course by maintaining the status quo of providing value for money and good-quality service, while admirable, will only prolong their decline into obscurity.

Importance of partnering with sustainable service providers



“An overwhelming 94% of agencies collectively consider partnerships with sustainable service providers absolutely crucial

# Driving sustainability certifications

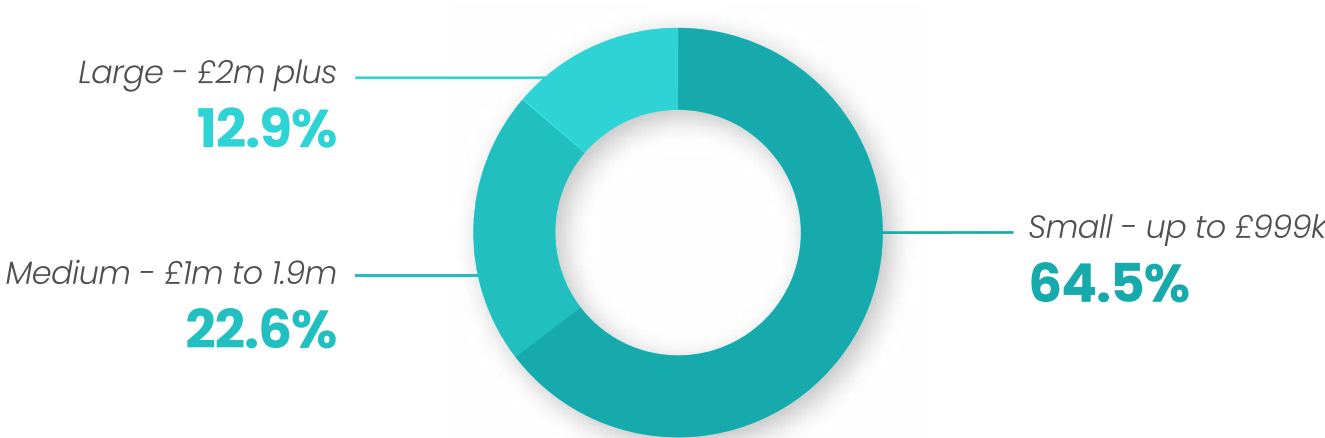
## Sustainability certifications – a roadmap to eco-success

Certifications validate an agency’s commitment to eco-friendly practices. They give confidence to stakeholders and provide a structure for industry-standard sustainability.

**23%** of agencies have not joined a sustainability scheme or achieved a certification. Small agencies make up **64.5%** of this segment, further confirming that small agencies are lagging behind large and medium-sized agencies.

Given that a significant portion have not committed to a scheme, questions arise around the familiarity of such schemes.

Agencies who have not joined or achieved certification



“A striking 23% of agencies have yet to engage in sustainability schemes, or achieve certifications

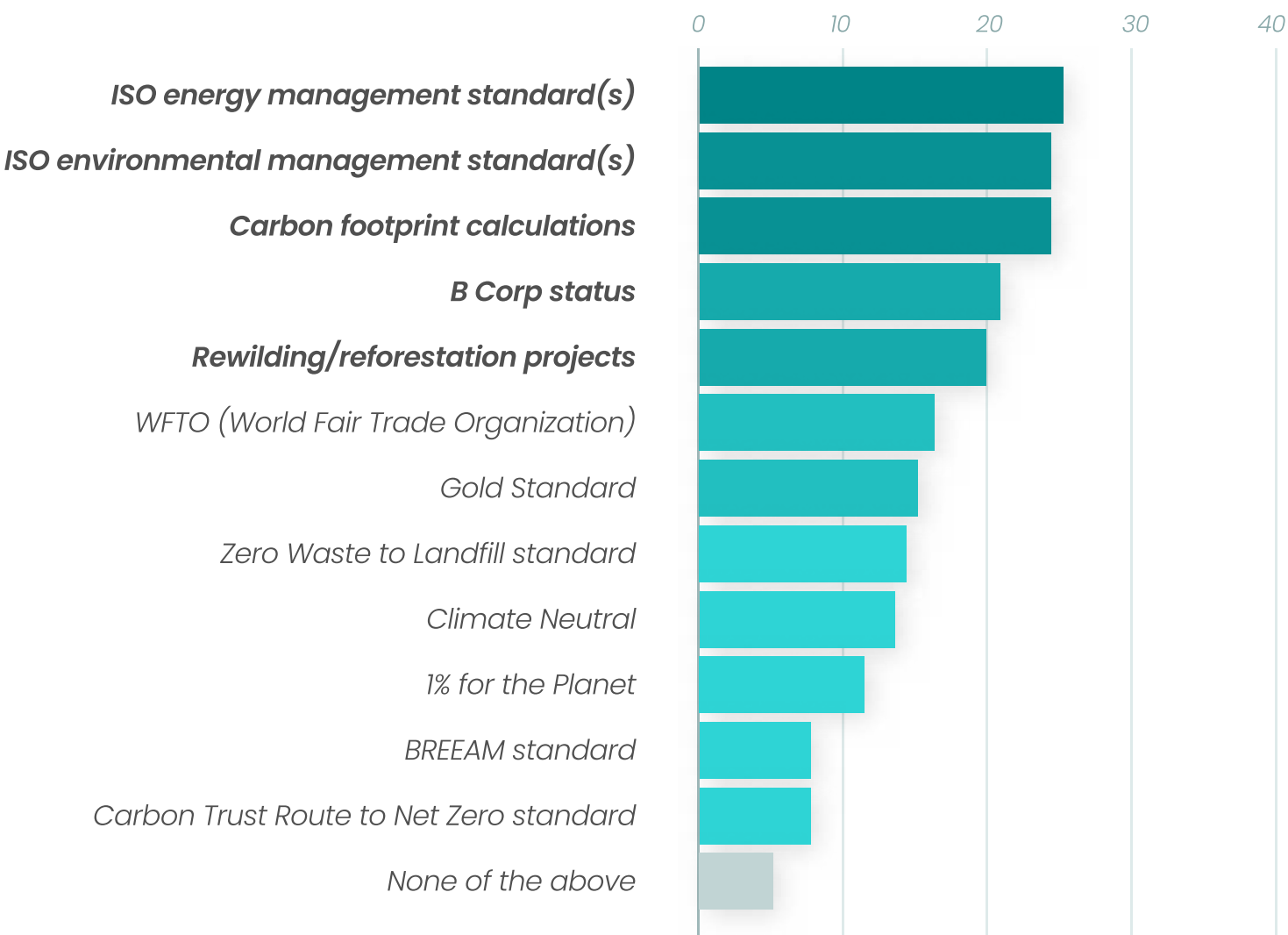


Agency familiarity with sustainability certifications and schemes

Our research found that there are varying levels of familiarity between schemes. Given the relatively large number of schemes in the market, we highlight the top five certifications by familiarity.

“ISO certifications reign supreme among agencies

Top 5 certifications by familiarity



The awareness of ISO certifications is dominant among agencies. Carbon footprint calculations have gained a foothold in the sector, perhaps because they are relatively easy to implement.

Rewilding and reforestation projects take fourth place. The lower familiarity with B Corp certification implies that there is room for improvement. Agencies that pursue B Corp may have an opportunity to stand out as leaders in holistic sustainability practice.



**EXPERT INSIGHT**  
**JANUSZ STABIK**

*I found this really interesting. It's fascinating to see B Corp certification (only) ranking fifth on the list, considering that B Corp (in the agency sector) seems to be gaining prominence. Currently, we're seeing a steady influx of agencies worldwide seeking B Corp accreditation.*

*We're getting contacted by about two agencies per week, all expressing their intent to go down the B Corp certification route.*

*This seems to be happening either because they genuinely align with the values of the 'eco-warrior' category or because they feel the industry's pull in that direction.*

*For them, B Corp certification is seen as the pivotal step that allows them to make a positive impact, particularly in sustainability and various other domains.*



**EXPERT INSIGHT**  
**NEIL RUSSELL-BATES**

*I would comment that certifications and sustainability schemes need careful navigation.*

*Agencies will have one certification, two at most, and will be able to demonstrate why their chosen accreditations can take the place of other certifications that clients have been asking for.*

*In other words, get familiar with the schemes, and not just the ones mentioned in this report, but other significant ones such as **Ecovadis**, **Science Based Targets Initiative (SBTi)**, and the **Carbon Disclosure Project (CDP)**, to name but a few.*

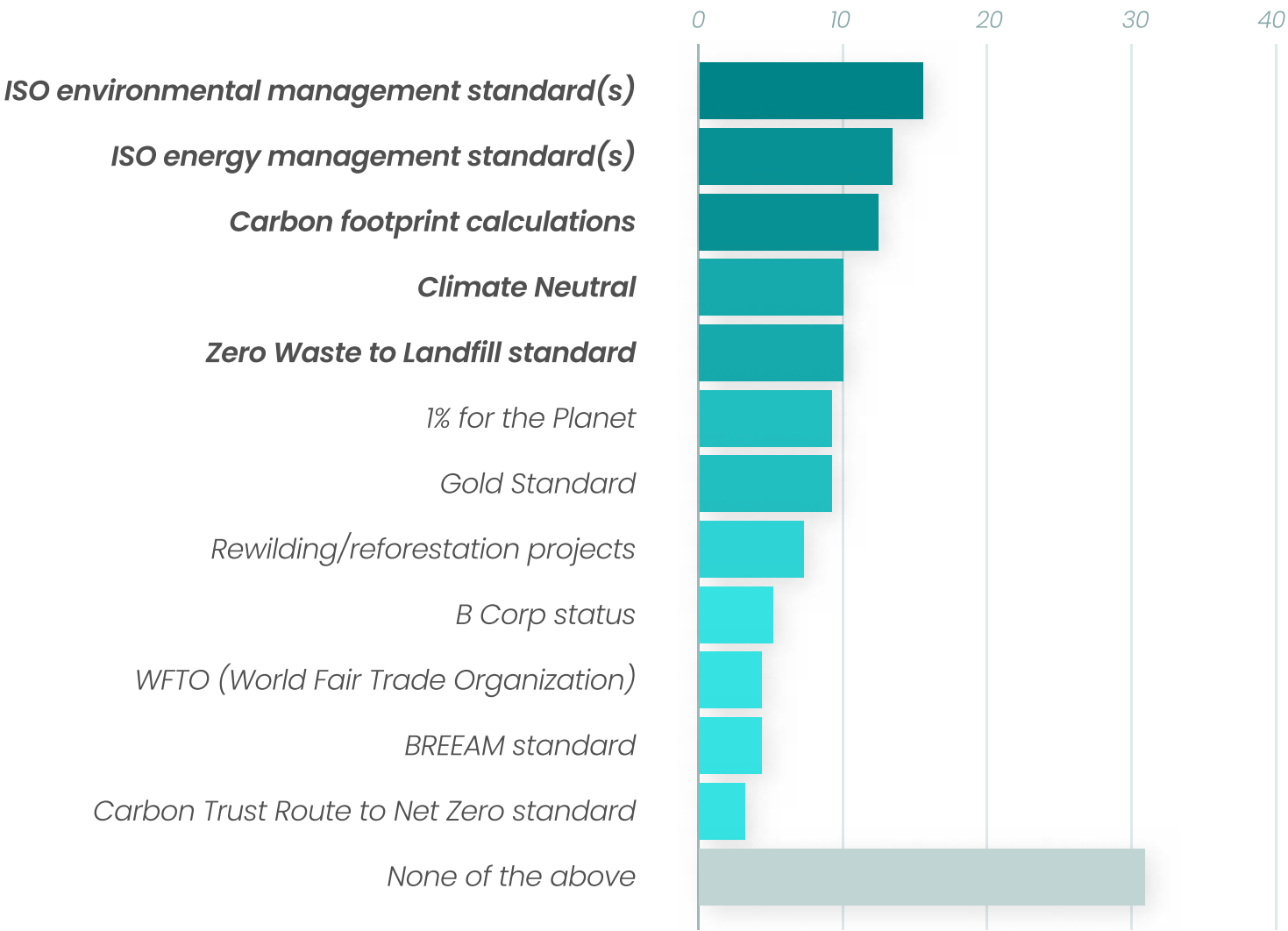
Agency engagement with sustainability or offsetting schemes and certifications

We assessed whether familiarity with these schemes translated into agencies joining or achieving a certification. The chart below depicts the popularity of agency engagement with sustainability schemes and certifications.

We addressed earlier how a significant portion of agencies have not engaged with a formal sustainability scheme.

The high familiarity of both ISOs has translated into dominance of actual enrolments. Carbon footprint calculations, Climate Neutral, and Zero Waste to Landfill round out the top five certifications. Tellingly, the relatively high familiarity of B Corp has not translated into full adoption. This is likely due to barriers such as a small workforce, limited finances, and longer ROI.

Sustainability schemes and certifications joined/achieved



## Industry adoption of B Corp

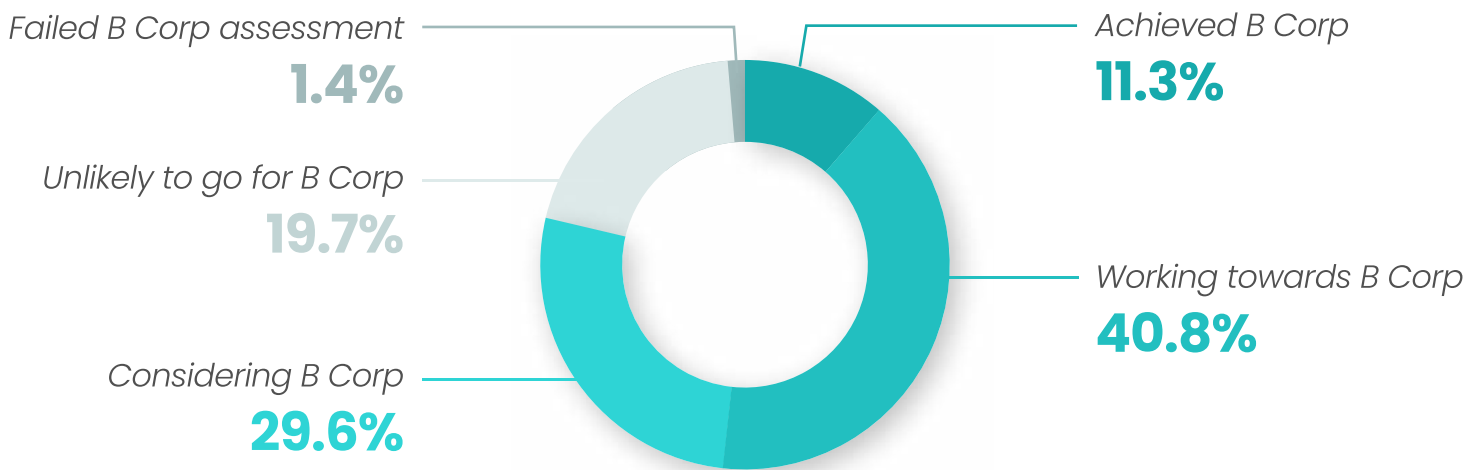
Anecdotally, B Corp is the trending certification within the agency sector. However, compared to the ISO standards, it's a challenger brand. Our results show that **41%** of agencies state they are working towards B Corp and a further **27%** are considering it.

Several factors make B Corp attractive:

- A need for a comprehensive approach to sustainability that B Corp provides
- Client demand for partners who demonstrate a strong commitment to sustainability
- A need for agencies to position themselves as leaders in the socio-environmental space

We expect the adoption of B Corp to continue its upwards trend.

Agencies' intentions to acquire B Corp certification



“For 41% of agencies, the path leads toward B Corp

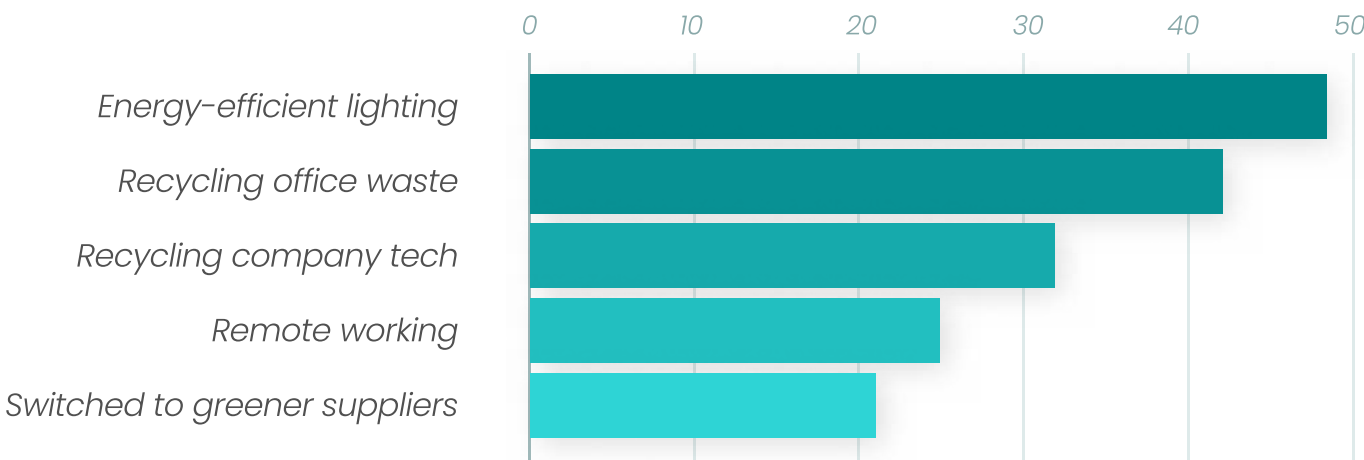
Carbon-reduction initiatives

Carbon-reduction initiatives are the visible outcome of a sustainability strategy. The top five practices are shown in the graph opposite.

These initiatives are popular because of their ease of implementation, low barriers, cost-effectiveness, visibly fast returns, and positive effects on employee well-being.

Due to the growing competitiveness around sustainability, these initiatives will increasingly have a short shelf life as clients become more demanding of their agency partners to achieve carbon neutrality.

Top 5 agency carbon-reduction initiatives



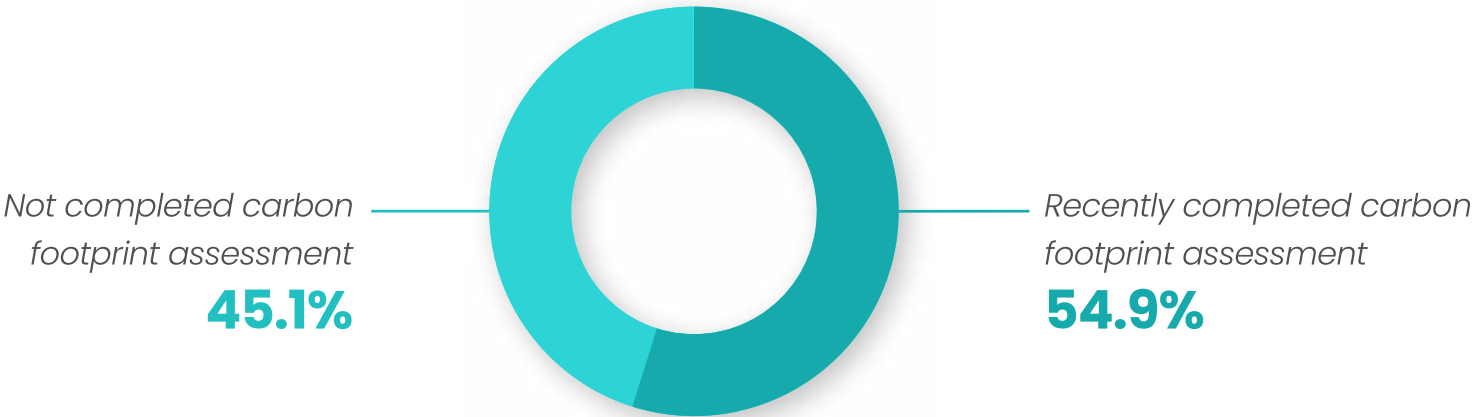
“A significant 68% of agencies have wholeheartedly embraced energy-efficient lighting in their office spaces

## Understanding carbon footprint assessments

Carbon footprint assessments are vital for organisations to improve environmental sustainability.

They offer insights into emissions, guide decisions, help achieve environmental goals, and showcase responsible resource stewardship. The risk of being accused of greenwashing is apparent when you consider that **45%** of agencies have not undertaken a carbon footprint assessment. For the **55%** who have, their main reason was to protect the environment and to save money.

Agency completion of carbon footprint assessment



**EXPERT INSIGHT**  
**CLAIRE HUTCHINGS**

*The fear of greenwashing is real for all agencies that believe they can slap a new tagline on their website and approach purpose-driven brands with cold outreach. A more holistic approach to their sustainable business operations must be considered.*

This report advises that agencies must become more demanding on the initiatives, as in future, government and clients will take carbon neutrality as a starting point for businesses to become carbon-positive.



**EXPERT INSIGHT**  
**NEIL RUSSELL-BATES**

*It is shocking that so many agencies still aren't measuring their carbon footprint when this is sustainability 101 stuff.*

*Of course, many agencies will think that because they have low overheads their footprint is quite small, but this betrays a lack of understanding of where a company's responsibility for its emissions begins and ends.*

*If they take account of their Scope 3 emissions, which they absolutely should, then these will likely account for 80–95% of their footprint and will be much more significant than their standard overheads.*



# THE CLIENT PERSPECTIVE: STRATEGY INSIGHTS

This section outlines the market perspective on sustainability. One-hundred agency clients shared their insights into the adoption of sustainability and what expectations they have for agencies.



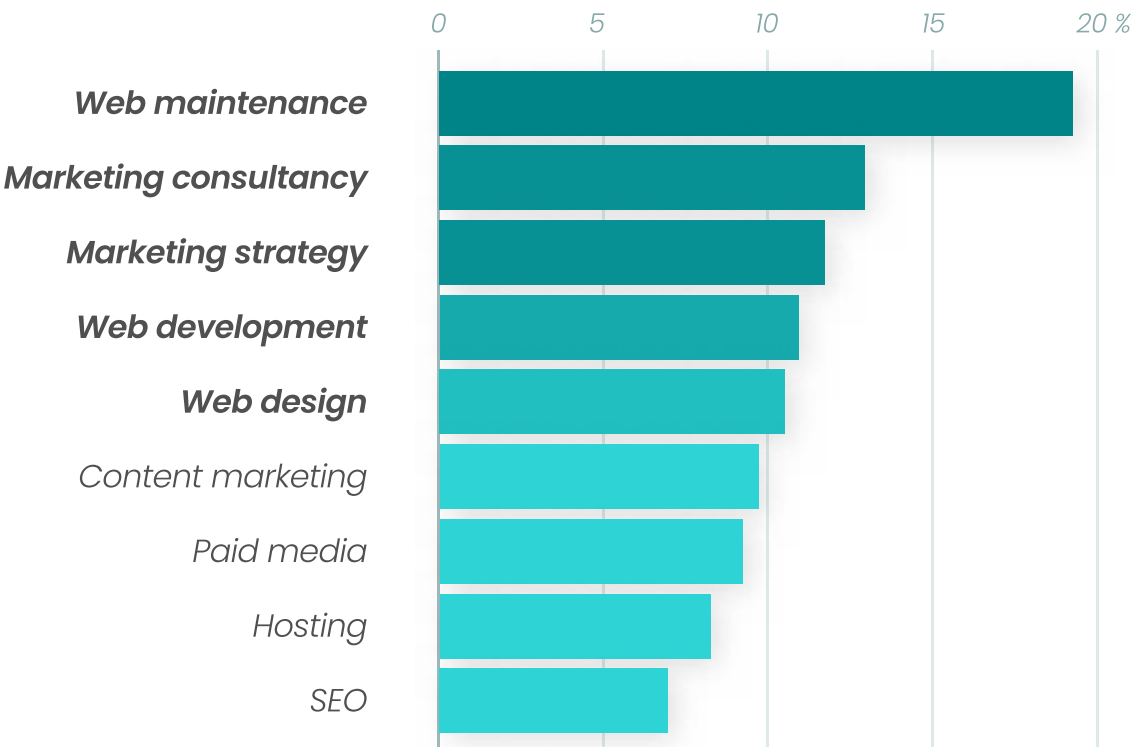
## Most popular services outsourced to agencies

This report explored the outsourcing landscape. This insight is essential for agencies as it sheds light on the most sought-after services they provide.

Importantly, all agency services leave a carbon footprint on Earth and – as you’ll see later in this report – clients expect agencies to reduce their impact to net zero over time.

“Agency services cast a dark carbon shadow on our fragile planet. What’s your response?”

Top 5 outsourced services



### RECOMMENDED ACTION

Sought-after services are key battlegrounds for survival. Given these findings, agencies must prioritise environmentally responsible practices while delivering them.

## Clients' understanding of sustainability

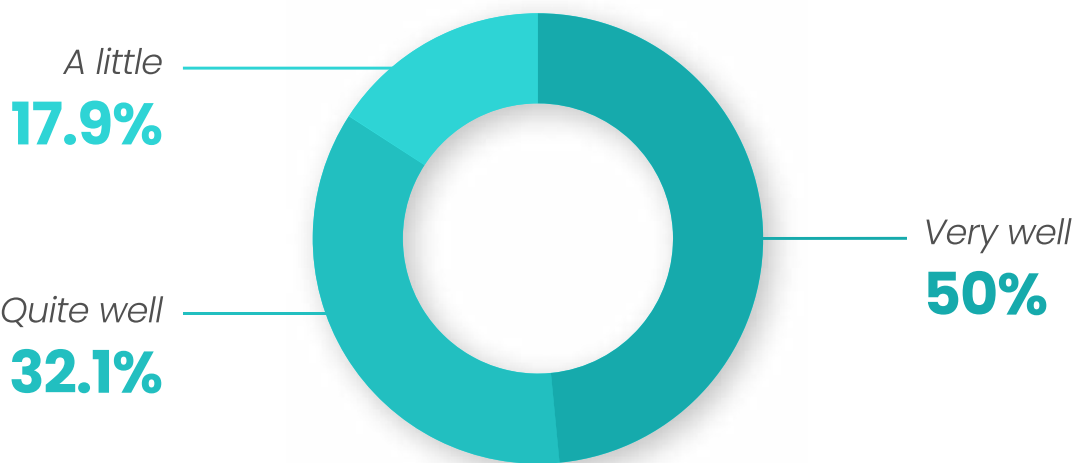
Agencies need to know the client's understanding of sustainability because it allows them to tailor solutions in line with the client's objectives.

Over **80%** of the market understands sustainability 'quite well' or 'very well'. As you'll see later in the report, agency clients are out-sprinting agencies in this area.

A deeper dive into the results found that there is a notable difference in the understanding of sustainable practices. **62%** of large businesses understand sustainability 'very well', as opposed to SMEs at **37.5%**. Large businesses see sustainability as an investment opportunity, as they're pushed by their own clients to adopt new practices.

This suggests that large businesses currently drive sustainable growth for the agency sector. They are the early adopters and the likeliest sources of the largest revenue streams.

Clients' understanding of sustainability



### RECOMMENDED ACTION

Agencies targeting large businesses must ensure that they have a clear sustainability strategy in place – one that they can effectively demonstrate to clients and prospects.

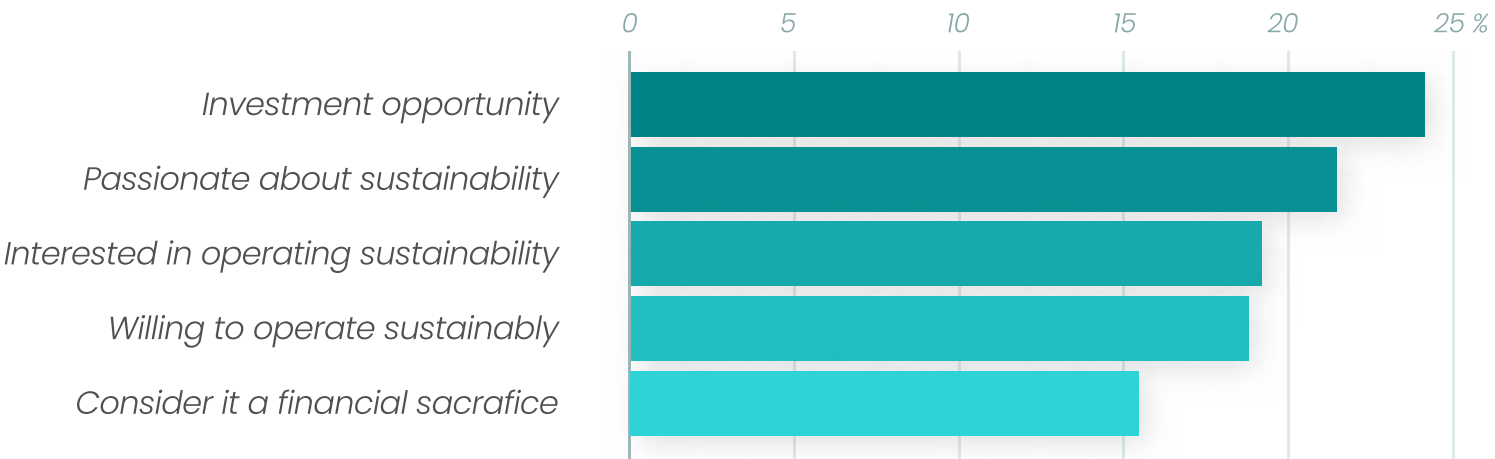
## Exploring client attitudes on sustainability

In this section we briefly explore client attitudes towards integrating eco-friendly practices into their operations.

**24%** of clients view sustainability as an investment opportunity. This is the largest group, and closely matches the agency survey, where **25%** of respondents also view sustainability as an investment opportunity – signalling a close alignment with each other.

We also see an emergence of clients who are passionate about sustainability for their business (**22%**). These ‘eco-warriors’ drive the agenda within their organisation. Other decision makers are interested in operating sustainably (**19%**) – though they’re at the early stages of their journey, while others are ‘willing’ to do so (**18.5%**), signalling a strong intent to take action. A sizeable segment (**15.5%**) of clients consider sustainability as a cost (financial sacrifice).

Top 5 client attitudes towards sustainability



### RECOMMENDED ACTION

Short term – target the top two segments as they are more ‘ready to buy’. To appeal to ‘investment opportunists’, agencies must highlight potential financial returns on sustainability investment. Similarly, to engage eco-warriors, create case studies that inform and educate these clients to partner with them.

Clients’ buying criteria for contracting an agency

Agencies are selected against how well they meet the buying criteria (critical success factors) of clients. Agencies must deliver on those factors better than the competition to win and retain business.

Quality of services, value for money, and sustainability credentials are the top three most important critical success factors for winning business. If agencies fail on this, they won’t win or retain clients.

A deeper dive into the data found that ‘sustainability credentials’ is the number one critical success factor for large companies, whereas quality of services is the number one success factor for SMEs.

Top three client needs (critical success factors)



EXPERT INSIGHT  
NEIL RUSSELL-BATES

Fundamentally, I recommend agencies take careful note of the fact that for clients, sustainability (in my own observations) is often seen as their number one success criteria, and they are pursuing sustainability goals because it is the right thing to do.

## Proving sustainability credentials

Of course, when it comes to proving green credentials, our research found that clients want:

- Information on agency efforts in working with environmentally responsible partners
- Formal certifications from awarding bodies
- Verified reports from third parties



### RECOMMENDED ACTION

For agencies to effectively compete on quality of service, value for money, and sustainability, they must review their current strategies and invest to plug weaknesses and strengthen capabilities to compete across all three areas.



*Sustainability – a top three client buying factor. It’s non-negotiable*

## The customers of clients are driving sustainable change

In the previous section, the research uncovered that ‘sustainability credentials’ is a critical success factor for clients when selecting an agency.

This is because change is being driven by clients’ own customer base. **92%** of client customers rate sustainability as ‘extremely’ or ‘very’ important. Sustainability is a transformative influence on shaping buyer behaviour.

### Ticking time bomb – a cliff edge awaits

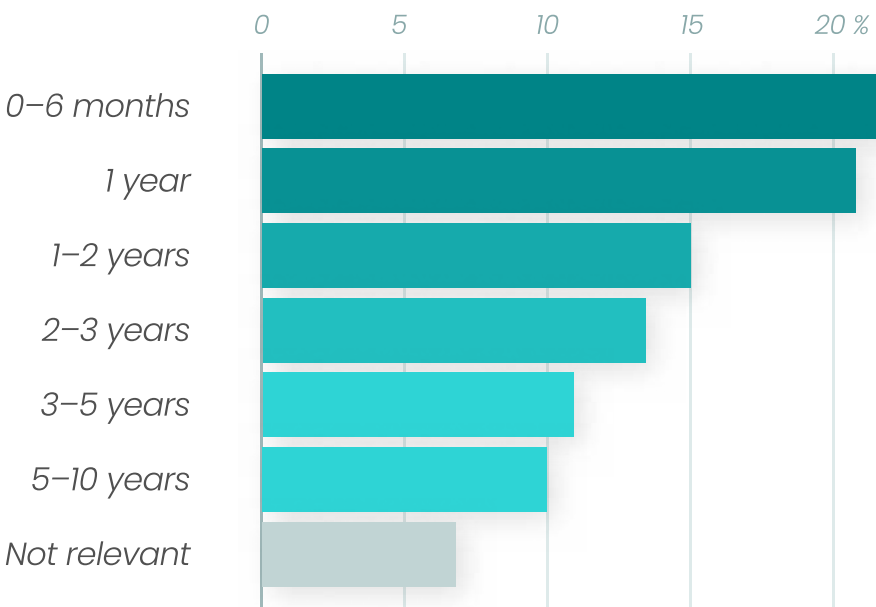
Agencies face a critical time to prove their green credentials. As outlined earlier in this report, a large proportion of agencies are late adopters, having not obtained any certifications or credentials at all.

This research found that **44%** of clients will seek a new agency if their current provider cannot prove their green credentials within 12 months. **60%** of clients will change their provider within two years, and **73%** will change their provider within three years.

Late adopters, typically small agencies, are potentially sleepwalking into oblivion. Earning sustainability credentials is a mission-critical strategy for all agencies.

Delving deeper into the data, larger clients (**71%**) are more willing to wait for up to 2–3 years for agencies to prove their sustainability commitments, while SMEs (**73%**) expect quicker results within 0–6 months.

Length of time for agency to prove commitment



### RECOMMENDED ACTION

The data underscores the need for agencies to adopt flexible strategies to meet the differing patience levels between large organisations and SMEs.

For example, initiate longer term partnership attraction plans for large organisations, while focusing on quick wins for SMEs.



If an agency's client base is predominantly SMEs, then they are more at risk than agencies who own a more balanced customer portfolio. Larger organisations' readiness to wait suggests a recognition of the time it takes to observe substantial sustainability changes, indicating a long-term perspective. On the other hand, SMEs' preference for quicker results aligns with immediate priorities.

The situation is still a grave problem for agencies. **41.5%** of clients report that they have sacked agencies due to a requirement for a sustainability certification. The evidence outlined in this report indicates that this observation will continue to rise.



## RECOMMENDED ACTION

**Agencies must address the barriers outlined in the agency section, prioritise their sustainability strategy, and obtain certifications to prove their commitment.**



### EXPERT INSIGHT JANUSZ STABIK

*I find myself in complete agreement with the notion of a looming crisis – a ticking time bomb, if you will. This ties back to the two distinct categories of sustainability-aware agencies we often encounter: the eco-warriors, and those being pulled towards sustainability. In both cases, there's a sense of necessity driving their actions.*

*We've noticed a significant uptick in tenders, pitches, RFPs, and inbound requests that demand sustainability, both from existing and potential clients. This growing requirement is a driving force, especially for those being pulled into the sustainability fold.*

*B Corp certification seems to be at the forefront of this movement. However, it's essential to provide a realistic perspective. It's not the killer USP agencies perceive it to be. Rather, it's evolving into a baseline standard that all agencies will eventually need to meet.*

*This realisation can be somewhat sobering for our clients, but it's crucial to emphasise that we encourage them to pursue it.*

*Nevertheless, we advise against pinning their hopes solely on B Corp certification as a unique selling point. The industry is moving toward a future where sustainability will become an inherent part of every RFP and brief.*

*In essence, we concur that we're standing on the precipice of a ticking time bomb, a cliff edge that's approaching rapidly. The transition to sustainability is not just a trend, it's becoming an industry standard, and agencies that fail to adapt may find themselves falling off that cliff sooner than they expect.*

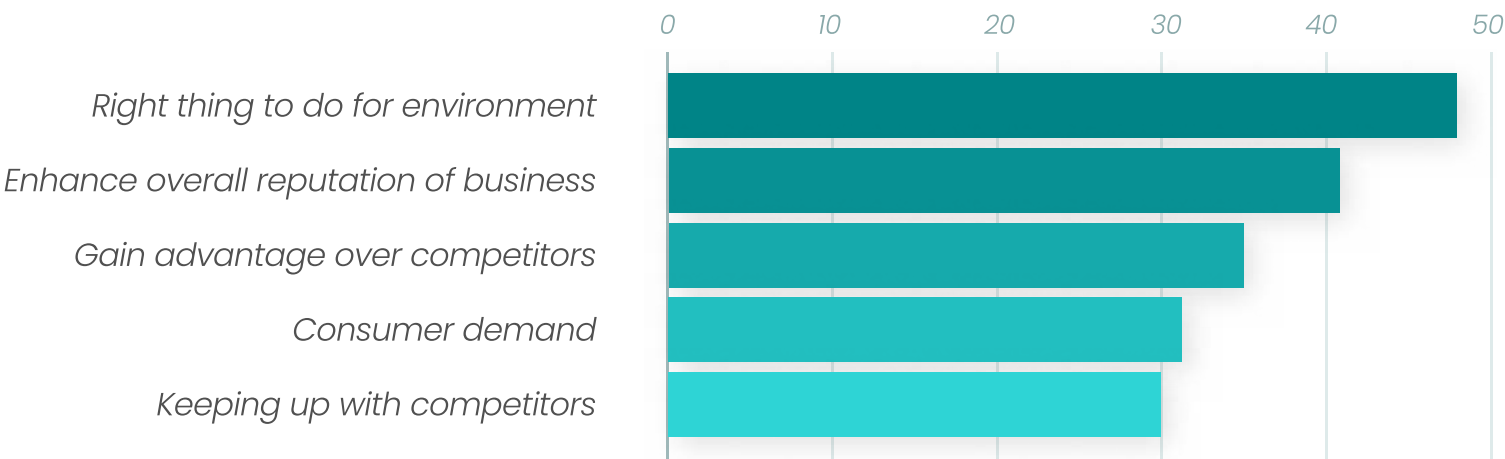
## Sustainability partnerships: An avenue to business growth

Sustainability partners are businesses who are focused on environmental and socially responsible practices. They matter because they enhance client brand reputation, foster innovation, and build resilience.

Clients’ main motivation is driven by an ethical commitment to environmental well-being. A significant proportion express a desire to do what is right for the environment as the driving force behind pursuing sustainable business partners.

The second key motivation behind clients pursuing sustainable partnerships is to boost their brand reputation. Thirdly, to gain a competitive advantage in a crowded market. The fourth most important client motivation is for them to align with consumer demand, and rounding out the top five is for clients to keep up with competitors.

Top 5 motivations for clients pursuing sustainability partnerships with agencies



### RECOMMENDED ACTION

When business planning, agencies must recognise the diverse needs of clients in pursuing sustainable partnerships and tailor their propositions accordingly.

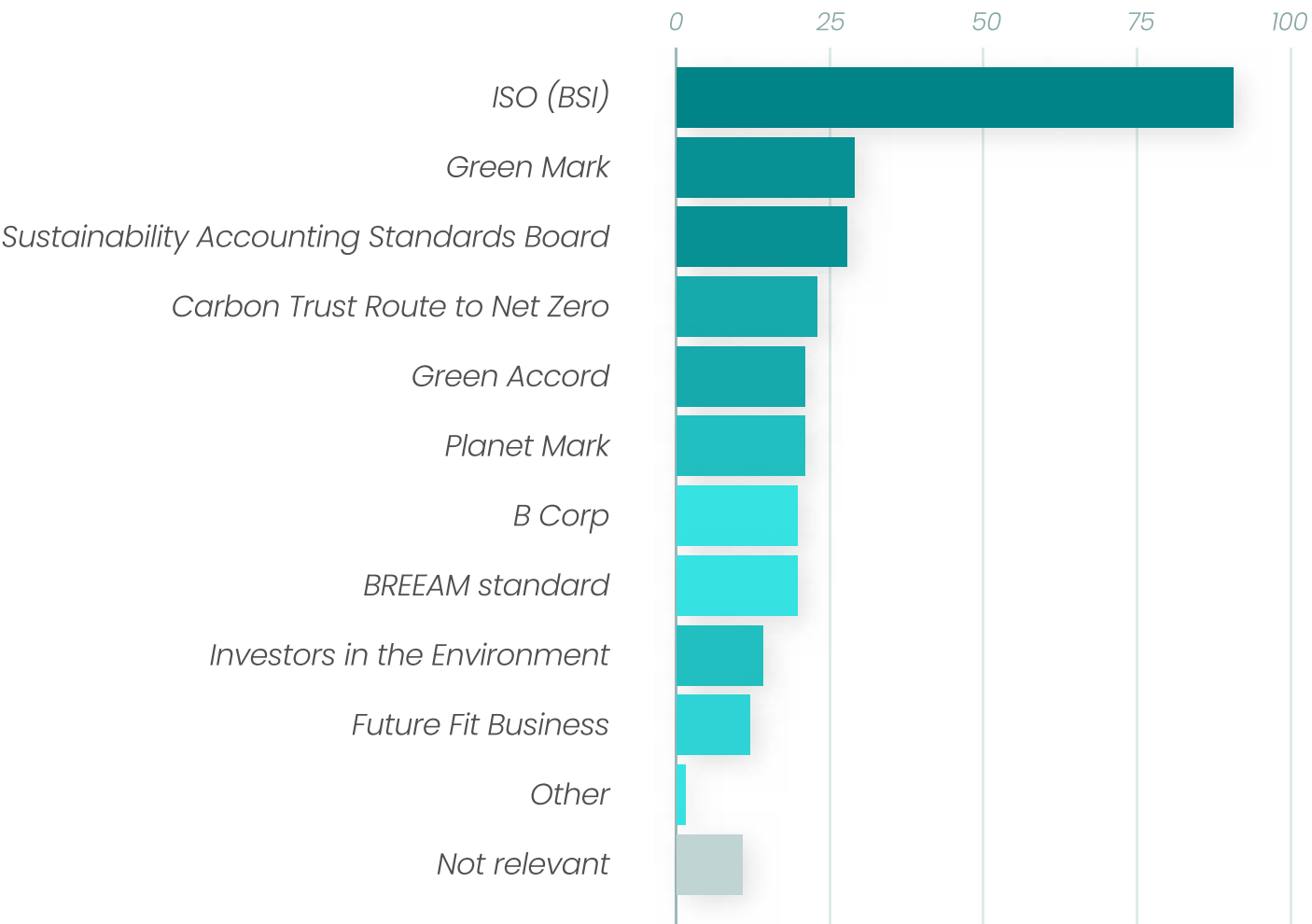
Agencies must then communicate how their services contribute to better environmental well-being, reputation enhancement, and competitive differentiation to effectively position themselves as valuable partners for clients seeking sustainability-driven collaborations.

# Sustainability certifications: The state of the market

Sustainability certifications provide verifiable proof for clients to check an agency’s eco credentials. When choosing an agency, clients have a clear inclination towards specific sustainability credentials.

ISO (BSI) standards are highly sought after due to their international recognition and stringent standardised framework. However, they do focus on the process without taking a holistic view of sustainability. Surprisingly, B Corp was ranked as only the eighth most sought-after certification among clients.

Top 5 certifications prioritised by clients



The other key observation from this particular finding is that clients have a much wider knowledge of sustainability certifications than agencies. This dramatically highlights the need for agencies to catch up, as they may be expected to gain accreditations in areas for which they currently have limited knowledge. Clients expect alignment – agencies must recognise this or lose out.



**RECOMMENDED ACTION**

Agencies must achieve a reputable accreditation and demonstrate that it meets a similar criteria to client preferences.

“ 41.5% of clients have ruthlessly axed agencies for lacking sustainability certifications

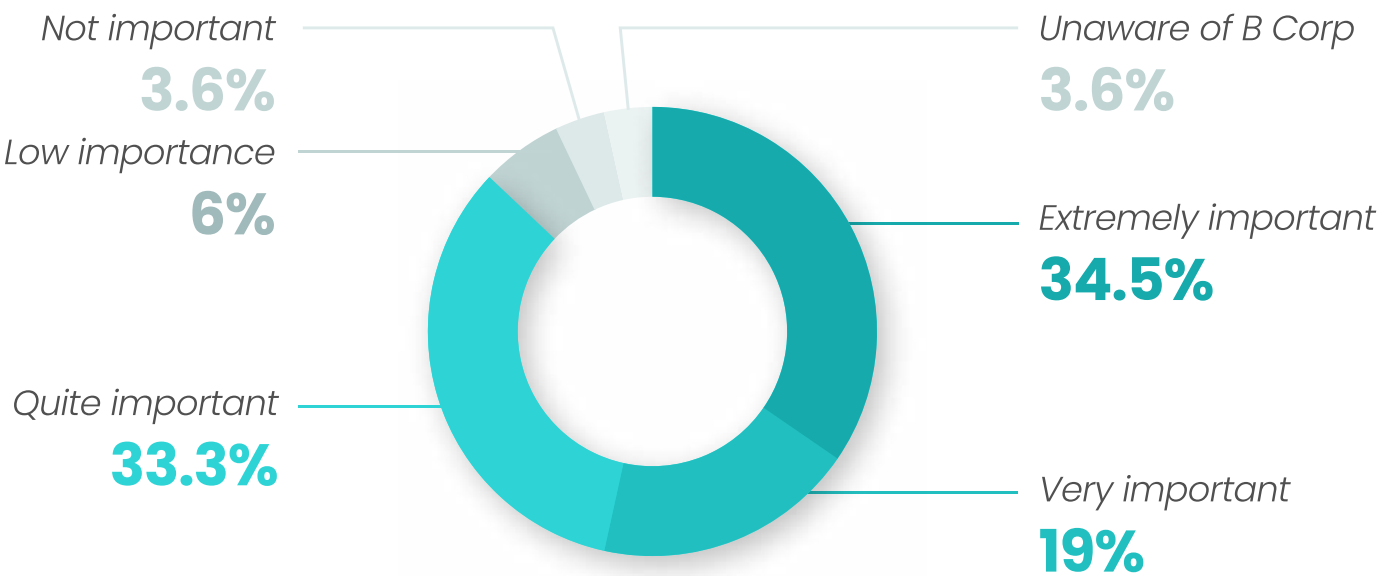
# B Corp status in the client market

While B Corp currently ranks as the eighth most sought-after certification among agency clients, when pressed deeper, their perception of an agency’s commitment to social and environmental responsibility has led to notable recognition of this certification.

From the pie chart opposite, **87%** of clients attribute substantial importance to B Corp (quite, very, and extremely important).

This suggests that B Corp is a meaningful indicator of an agency’s commitment to sustainability through the client’s eyes.

Importance of B Corp when selecting an agency



## RECOMMENDED ACTION

Agencies should strategically embrace B Corp and pursue certification. This will attract ethically conscious clients and elevate themselves as a sustainability partner.

Agencies should partner with B Corp-accredited clients to engage in mutually beneficial collaborations that raise awareness and drive returns on sustainability investments.

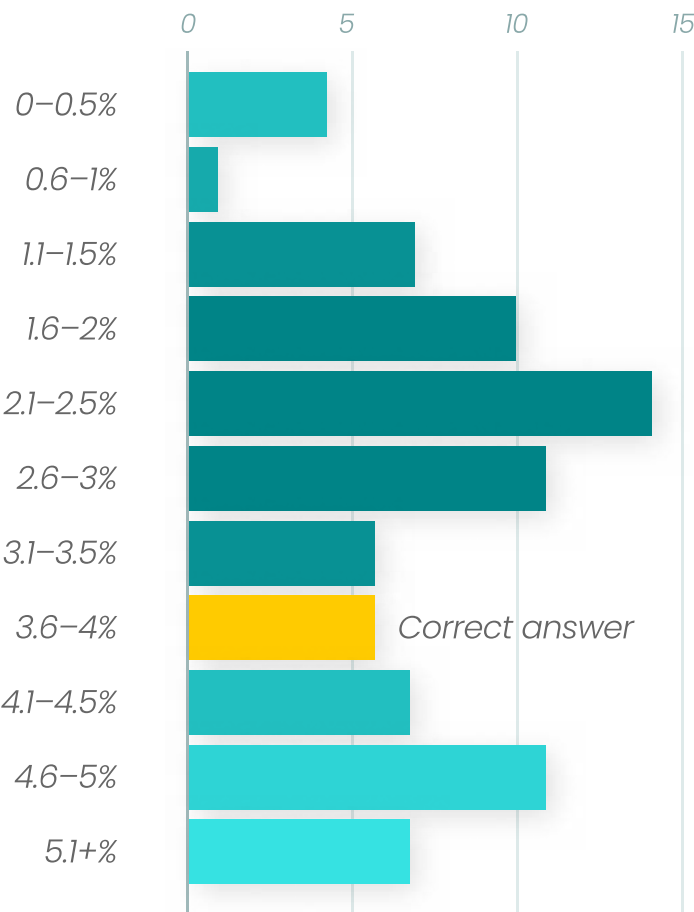
## The internet’s carbon footprint

As the UK works towards a net zero future, this research was focused on gauging client awareness of the global carbon impact of the internet and digital industries. Any knowledge gaps allows agencies to tailor education and sustainability strategies accordingly.

Approximately **4%** of global carbon emissions are caused by the internet and digital technologies.

The survey found that nearly **65%** of clients underestimate the level of carbon emissions of the internet. Of those, **75%** are SMEs, and **47%** are large companies. The results indicate a lack of awareness among SMEs on their own carbon footprint.

Client estimate of digital carbon emissions as a % of global total



### RECOMMENDED ACTION

The report advises that agencies should adopt a thought leadership approach to educate organisations on their digital carbon footprint, thus building trust and enhancing their brand reputation.

“Approximately 4% of global carbon emissions are caused by the internet and digital technologies

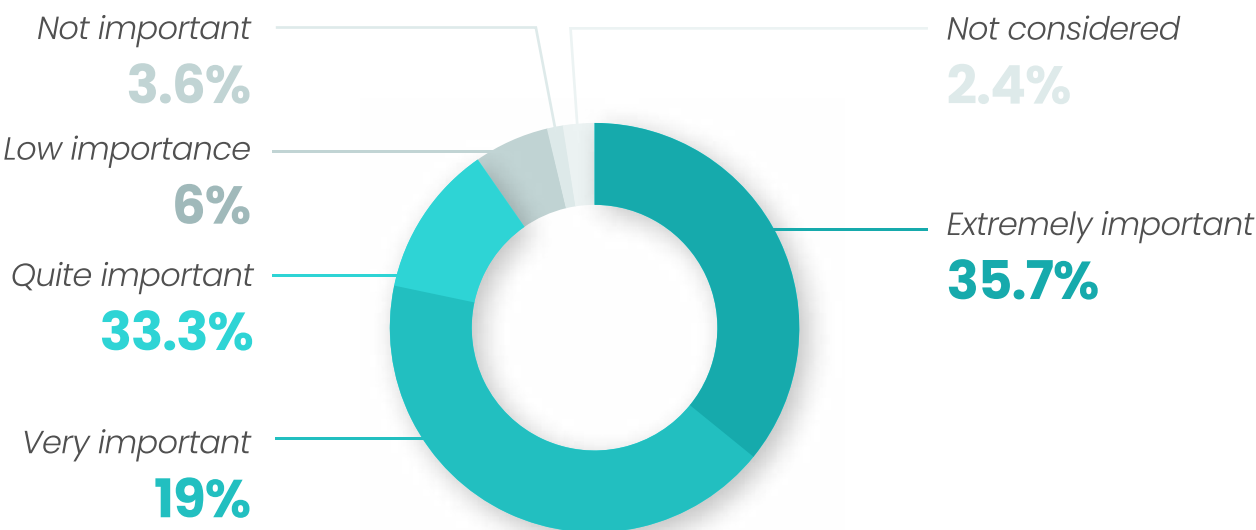
## The importance of low-carbon footprint websites to agency clients

As we know from earlier findings, web services are among the top five outsourced services. Web hosting in particular is significant because it directly impacts the environmental footprint of online operations.

Choosing eco-friendly and energy-efficient web hosting providers helps reduce the carbon emissions associated with data centres. The pie chart opposite reveals that **90.5%** of clients believe that owning a low-carbon footprint website is collectively important to their business (quite, very, or extremely important). However, there is a divergence between large companies and SMEs.

While both segments consider a low-carbon website to be important, a higher proportion of larger companies (**51%** very, **43%** extremely important) prioritise this compared to SMEs (**40%** very, **25%** extremely important).

Importance of low-carbon footprint websites



*With 90.5% of clients sounding the alarm on the crucial need for low-carbon websites, agencies face an adapt-or-die ultimatum*



## Low-carbon websites are an expectation, not a nice-to-have

---

Clients view 'low-carbon websites' as an expectation, not a luxury. Further, clients view a low-carbon website as a reflection of their commitment to ethical and responsible practices and perceive it as a tool to enhance brand reputation.

“Late-adopter agencies only have 36 months before they sleepwalk into oblivion



### RECOMMENDED ACTION

Agencies must incorporate sustainable web practices to meet the demand for low-carbon footprint websites. They must optimise energy efficiency and utilise eco-friendly hosting options.

Agencies must promote a clear message that the websites they build and host have minimal impact on the planet, positioning their clients at the forefront of the market.

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# AGENCY VS CLIENT: STRATEGY INSIGHTS

This section compares the survey outcomes between agencies and clients. Providing rare insights, this section therefore identifies disparities and opportunities for agency leaders.

Understanding both sides is crucial for agency leaders to create a more effective sustainable strategy implementation.



## Agencies lag behind clients on environmental sustainability concepts

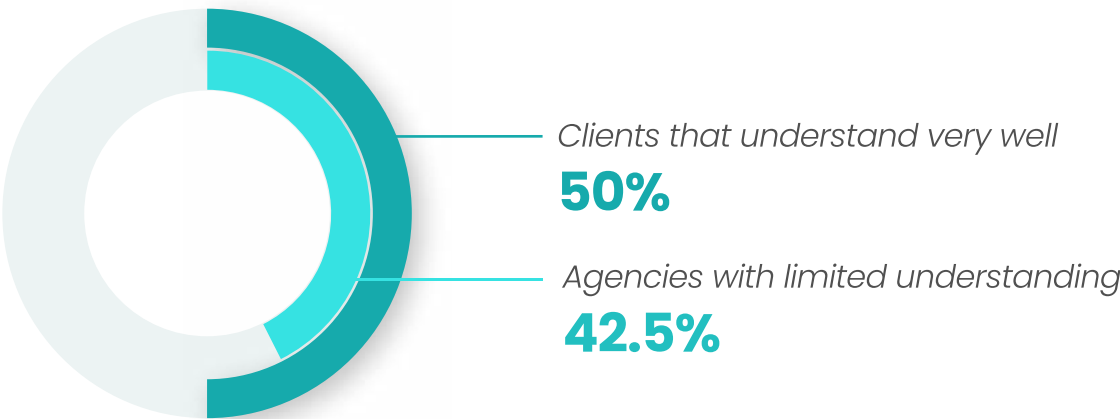
Strategic alignment with clients is key for agencies. When comparing agency and client understanding of ‘environmental sustainability’ and ‘sustainable practices’, the data revealed that **50%** of clients claimed to understand sustainability ‘very well’. Conversely, only **42.5%** of agencies claimed to have a limited understanding of sustainability.

Clearly, agencies are late adopters in this respect. This lagging could have several implications:

- **Strategic misalignment:**  
Agencies may struggle to effectively align their strategies with client sustainability goals if there is a significant knowledge gap

- **Worsening client relationships:**  
The gap in understanding may impact the quality of client–agency relationships, as clients expect agencies to provide expert guidance on sustainable practices
- **Irrelevance:**  
Agencies may appear out of touch, particularly as sustainability is a critical success factor for winning business

Client vs agency understanding of sustainability



### RECOMMENDED ACTION

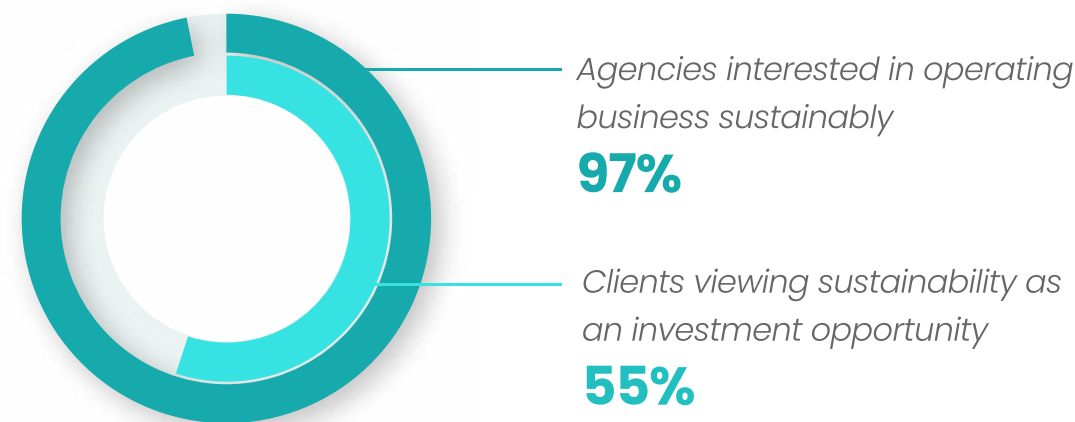
Agencies must invest in education, staying on top of the latest sustainability trends.

Strategy insights almost aligned with interest in environmental sustainability

Both agencies and clients share a strong interest in operating their businesses in an environmentally sustainable manner. **97%** of agencies have a straightforward interest in developing environmentally sustainable operations, while **55%** of clients view sustainability as an investment opportunity.

This implies that clients view sustainable practices as a strategic approach to generating new business relationships, growth, and long-term profitability.

Attitudes towards running business in sustainable way



RECOMMENDED ACTION

Agencies need to align with the investment-oriented mindset of agency clients. Use personalised, value-driven language in proposals and messages, e.g. highlighting ROI and carbon savings.

Clients are ahead of agencies on top sustainability schemes

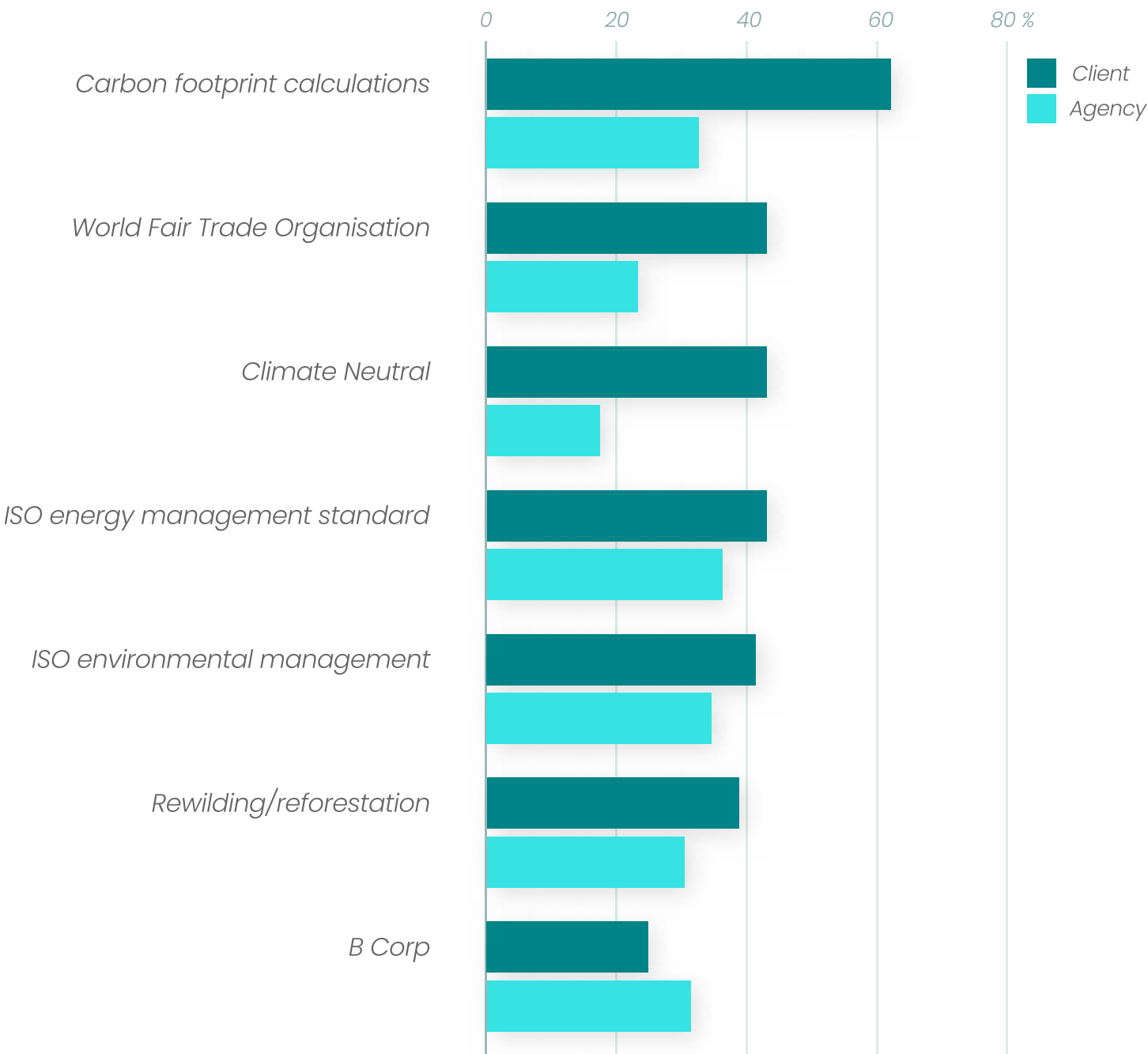
The next set of findings indicate that clients have a notable advantage in their familiarity with sustainability schemes. The graph highlights how clients’ familiarity with the most popular schemes outstrips that of agencies, except in the case of B Corp.



RECOMMENDED ACTION

Agencies must improve their familiarity with a broader range of sustainability schemes that are familiar to clients. This will improve their credibility in clients’ minds.

Client familiarity with sustainability schemes & certifications



# Business development insights

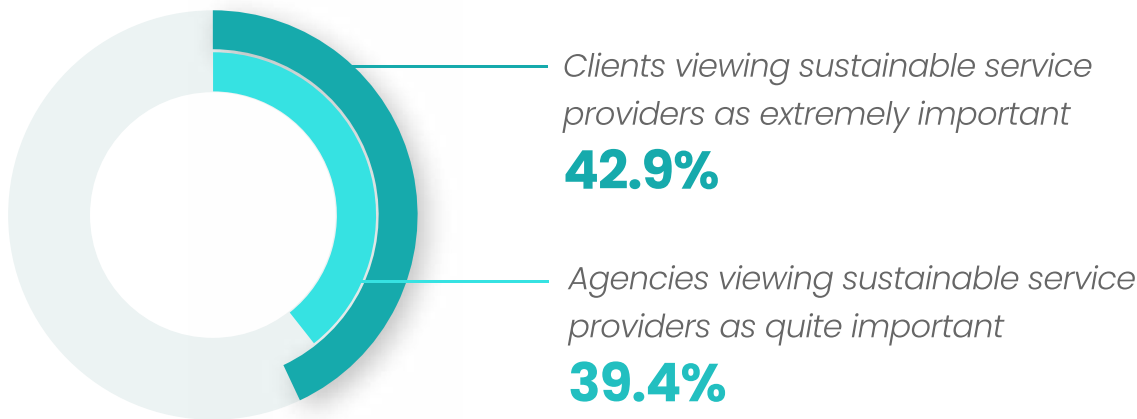
## Clients value sustainable service providers more than agencies do

Collaborations with sustainable partners are crucial components of a successful strategy.

However, the data suggests that agencies are once again lagging behind clients when it comes to understanding the importance of forming sustainable partnerships within the industry. Nearly **43%** of clients advise that partnerships are 'extremely important', whereas under **40%** merely state they are 'quite important'.

This indicates that agencies might not have fully grasped the extent to which clients prioritise sustainable service providers in their commercial relationships.

Client vs agency understanding of sustainability



### RECOMMENDED ACTION

Clients have indicated a strong desire for environmentally responsible business relationships. Agencies must prioritise becoming a more sustainable service provider and provide certifiable proof to clients.

Agencies are late to catch on that sustainability credentials win business

As this research has already highlighted, sustainability is one of the top three critical success factors alongside the provision of a quality service and value for money.

The majority (**55%**) of agency clients place high importance on agencies proving their environmental claims. The **35%** of agencies who currently have no environmental credentials may not gain any business, despite **31%** of agencies reporting they've won business on the back of their certifications. This trend will rise, as sustainability certifications possess significant untapped marketing potential.

Winning business through sustainable certifications



RECOMMENDED ACTION

Agencies must understand the marketing potential of sustainability and achieve the right certifications in line with client requirements. With time and resources being a challenge, choosing one of the top five certifications would be a good start.

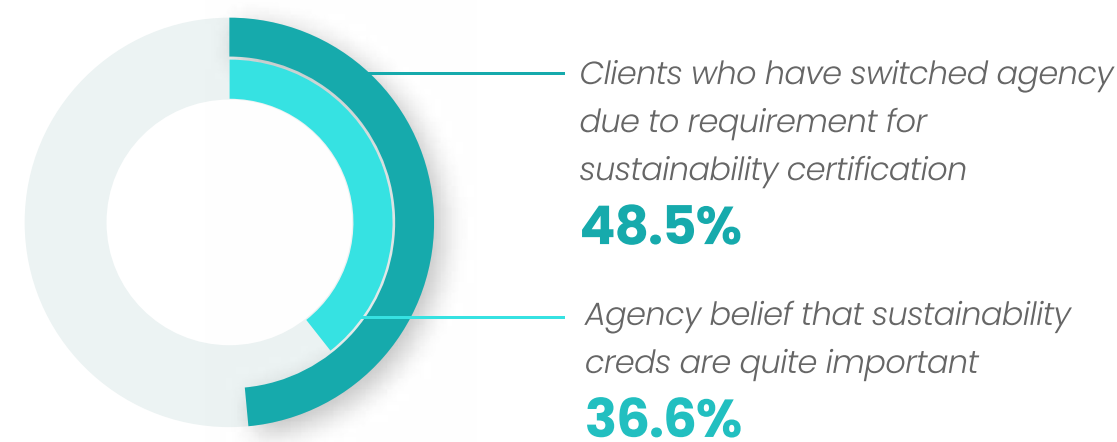


Sustainability credentials: Agencies are lukewarm; clients view as high stakes

The data suggests a disconnect between agencies’ more cautious, lukewarm recognition of sustainability importance (nearly **37%** view it as ‘quite important’) and clients’ aggressive, high-stakes emphasis on tangible sustainability credentials.

As mentioned elsewhere in this report, nearly **50%** of clients have switched agencies due to a lack of sustainability certifications. The level of importance indicated by agencies falls short of a firm commitment and needs to improve.

Agency perception of importance of own sustainability credentials vs client action



RECOMMENDED ACTION

Agencies must leap across the sustainability chasm with clients or be swallowed into obscurity

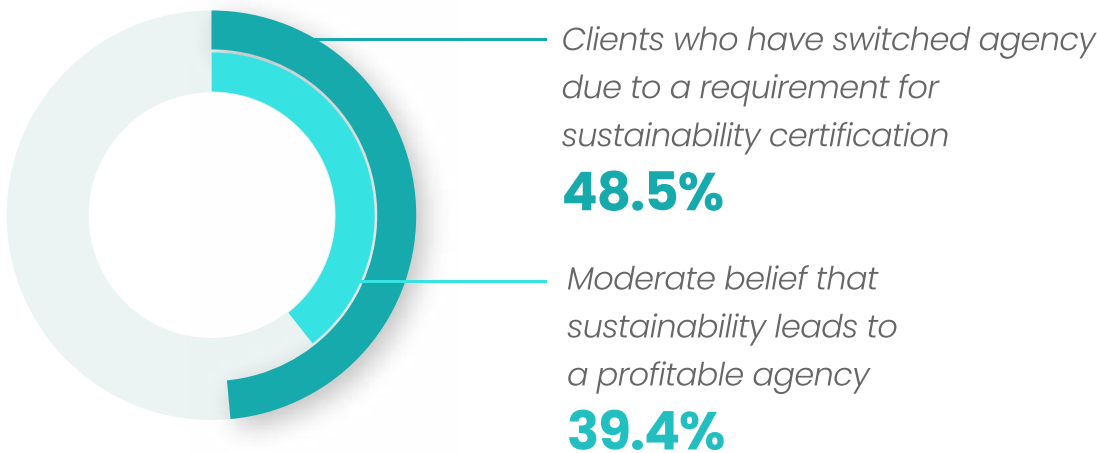
## Agencies underestimate the profit impact of sustainability

The lukewarmness that agencies have for sustainability certifications is evident in this next set of findings.

Nearly **50%** of clients will switch providers if agencies can't prove that they have sustainability certifications.

The agency view is stark: only **39%** see sustainable practices as a path to profitability. Yet, the power balance tilts toward clients who demand alignment with their values. Sustainability is no longer a buzzword but a client imperative, while agencies lag behind in prioritising it. Change is overdue in the agency sector.

### Attitudes on profitability of sustainable business practices



### RECOMMENDED ACTION

Agencies need to prioritise sustainability in business planning and become accredited.

# Sustainability certification insights

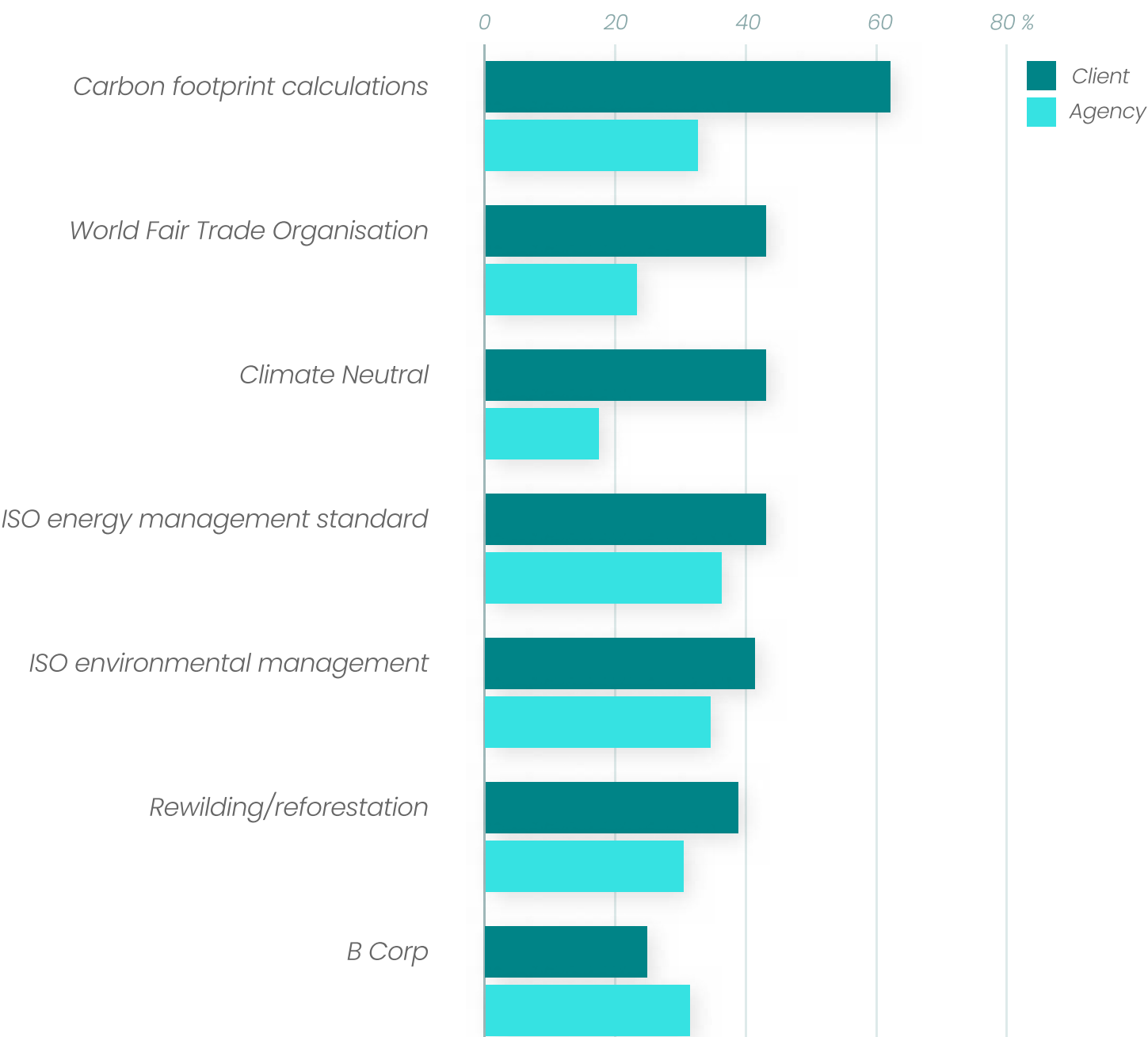
## Sustainability certification disconnect

The pursuit of sustainability certifications is a strategic priority for agencies. However, for pioneering agencies, the data suggests a misalignment between what agencies are pursuing and what clients look for when selecting an agency partner.

This chart outlines the top five certifications pursued by agencies and the top five certifications required by their clients.

ISO (BSI) is by far the number one sustainability certification required by clients. Forward-thinking agencies are pursuing ISO in alignment with client requirements. However, the only other area of alignment between agency and client is in the accreditation of B Corp status.

Top 5 client certification requirements vs top 5 agency certifications



Even then, client demand for B Corp accreditation outstrips agencies' pursuit of B Corp. This misalignment suggests that agencies are potentially wasting their return on sustainability investment through a missed opportunity to meet a client's sustainability requirements.



RECOMMENDED ACTION

Agencies must reassess their sustainability and ensure the achievement of a client's top five in-demand certifications, e.g. BSI, ISO, Green Mark, Sustainability Accounting Board, Carbon Trust Route to Net Zero, and potentially B Corp



EXPERT INSIGHT  
CLAIRE HUTCHINGS

*A strong positioning is core to any agency's success in the UK. To scale and thrive, agencies must communicate their proposition and go above and beyond just offering their services.*

*There was a time when purpose-led agencies could position solely around their green credentials. Of course, agencies want to create more meaningful work for businesses that share their values. But it's an all too familiar story, as this*

*research highlights 41% of agencies actively working towards B Corp status and a further 27% contemplating it, sustainability is now a hygiene factor, not a differentiator.*

*Positioning your agency solely around sustainability and your purpose-led initiatives alone is no longer enough to cut through the noise in our saturated market.*

*Sustainable business practices, certifications, and accreditations are instead fast becoming a basic need for all agencies regardless of size or specialism.*

*Sustainability and CSR initiatives should be considered a strand of all agencies' positioning and marketing strategy, rather than a standalone activity.*

*For an agency to truly position itself around a purpose-driven sentiment, they must do more on their own sustainable operations and ways of working.*

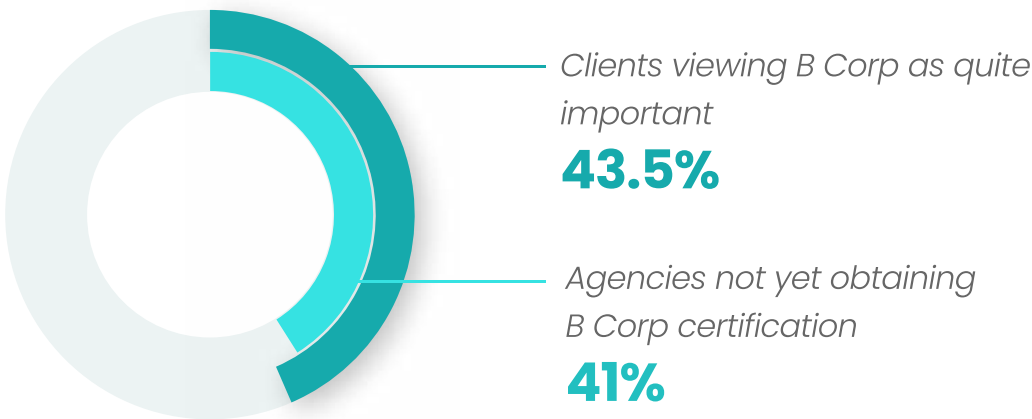
Clients value B Corp certification, as do agencies

Potentially, B Corp offers an effective route to close the sustainability gap between agencies and their clients. The findings in this report suggest that both groups value this certification.

However, a dichotomy emerges where **43.5%** of agencies rate B Corp as ‘quite important’ (despite not being in the top five required certifications) and **41%** of agencies have not obtained B Corp yet but are actively considering it. There is a performance gap that should be bridged by agencies.

B Corp offers the potential for strategic differentiation because it’s a holistic process covering governance, environment, staff well-being, and ethical choices. It’s a comprehensive transformation with long-lasting advantages.

B Corp attitudes: Agency vs client



“Strong positioning is core to any agency’s success – sustainability included!”

# Carbon reduction insights

## Client demand for low-carbon footprint websites creates opportunity for agencies

Earlier, this research reported that web services are the most outsourced services by clients.

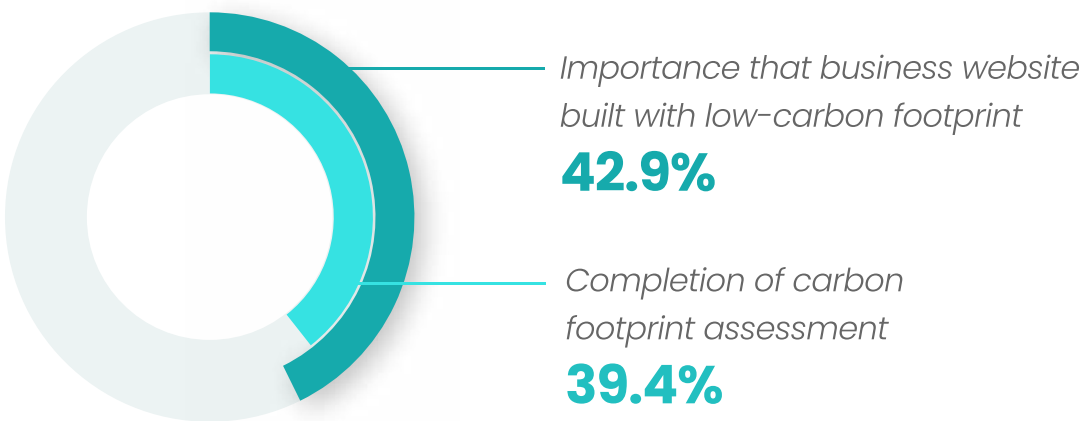
The chart opposite indicates that nearly **43%** of clients value low-carbon footprint websites, while only **39.4%** of agencies indicated that they had completed a carbon footprint assessment.

This suggests that clients prioritise sustainable practices more than agencies.

There is a potential misalignment between agencies' current sustainable practices and their clients' preferences.

While agencies have intentions to address future sustainability, clients are placing immediate importance on low-carbon footprint websites.

Carbon footprint alignment: Agency vs client



### RECOMMENDED ACTION

Agencies need to accelerate their transition to a low-carbon product range. This will boost differentiation and enhance client satisfaction.

# CONCLUSION

The agency market is dynamic. Sustainability has emerged as a pivotal factor in shaping the success of agencies. Generating powerfully positive returns on People, Planet, and Profit is the minimum expectation for all agencies, clients, and their supply chains.





# The **agency roadmap** to a more sustainable future

Whether agency leaders are ‘Eco-warriors’, ‘Customer champions’, or ‘Tick-boxers’, they must navigate this dynamic terrain.

From bridging the gap between agencies and clients to capitalising on sustainability certifications, the insights in this report provide a roadmap for agencies to thrive in a world where sustainability is no longer an option, but a necessity.

In conclusion, this research reveals several critical implications for agency leaders:

- **The performance gap:**  
Agencies lag behind clients in grasping sustainability concepts, potentially jeopardising client relationships. Agencies must bridge this gap
  - **Differing priorities:**  
While both agencies and clients express interest in sustainability, clients see it more as an investment opportunity. Agencies must align with clients
  - **Sustainability familiarity:**  
Clients are more familiar with sustainability schemes than agencies. This may damage an agency’s credibility in front of clients
  - **Sustainable partnerships:**  
Sustainable industry partnerships hold high value for clients. Prioritising more sustainable partnerships to the agency network is crucial
  - **Importance of credentials:**  
Clients increasingly demand proof of environmental claims, making certification crucial for agency competitiveness
  - **Profit impact:**  
Agencies underestimate the profit impact of sustainability. 73% of clients are likely to fire agencies without certifications, within the next three years
  - **ISO or B Corp:**  
ISO dominates client requirements for certification, however B Corp’s holistic approach will appeal to existing and prospective clients
  - **Low-carbon footprint:**  
The demand for low-carbon footprint operations is an opportunity for agencies to enhance client satisfaction and loyalty
- In response to these findings, we urge agency leaders to leverage the report findings to create a strategic roadmap that closely aligns with evolving client and societal expectations.
- In turn, this will generate stronger returns on sustainability investments covering People, Planet, and Profit.



**EXPERT INSIGHT**  
**CLAIRE HUTCHINGS**

*This research suggests agencies need to start walking the walk when it comes to sustainability.*

*89% believe sustainable practices can make their agencies more profitable, yet 35% have no sustainability credentials, and 45% haven't even completed a carbon footprint assessment.*

*There is high familiarity with various ISO certifications and accreditations, so why aren't agencies putting the effort in to obtain them? Are agencies at risk of not taking their own medicine?*

*There's no amount of marketing or positioning strategy that can fake your sustainability credentials – it takes time, effort, and investment to get it right and consistently evolve.*



**EXPERT INSIGHT**  
**NEIL RUSSELL-BATES**

*From what I see in the marketplace, sustainability is racing up everyone's agenda and it is good to see this report reaffirming much of what I have witnessed first-hand. In my opinion, this report is a great reflection of reality and should be a wake-up call for many.*

*This report does a great job of highlighting that gap in thinking between clients and agencies, and if the latter want to acquire and retain good client relations, they urgently need to bridge that gap if they aren't already doing so.*

## Agency game plan: **Key actions**

### 1 **Get a carbon audit**

- Begin your sustainability journey by conducting a comprehensive audit of your operations
- This will help you identify areas for sustainability improvement and serve as a baseline for measuring progress
- The free **B Corp Impact Assessment** digital tool is a good start

### 2 **Reduce your footprint**

- Actively minimise your environmental and social footprint
- There are a number of ways to get started, from energy efficiency to waste reduction, and beyond

### 3 **Offset what you can't reduce**

- Achieving full sustainability may be challenging – offsetting will help bridge the gap
- Invest in credible carbon offset programs to neutralise your unavoidable emissions
- Explore Gold Standard, VERRA, CCB, and SCS offsetting programs

## 4 Obtain certifications

- Consider pursuing recognised sustainability certifications such as ISO 14001 (Environment) or others outlined in this report
- Certifications validate your efforts and commitment to sustainability to your clients and partners

## 5 Be authentic

- Authenticity is important. It builds trust. Ensure that your sustainability efforts align with People, Planet, and Profit

## 6 Shout about what you're doing

- Sustainability is an ongoing journey. Communicate your achievements and goals openly, both internally and externally
- Sharing your story can inspire others and create a positive ripple effect in your industry and community

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