

BEYOND REACH THE SOCIAL IMPACT OF DIGITAL ADVERTISING AND MEDIA

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Executive Summary

This gap analysis is a first attempt to look at social sustainability in digital advertising as a system rather than a set of isolated projects. The intention is not to introduce another label or score, but to bring clarity to a dense and still poorly mapped landscape. Until now, much of the industry has only seen the first row of trees; this report steps further inside, offering a structured, evidence-based view of where the sector stands and where it falls short.

Surfaced Areas of Risk & Opportunity



To build this picture, we invited a broad group of stakeholders, including academics, media owners, industry initiatives, and practitioners in areas such as verification and measurement, to share information about their approaches. Participation varied, and that variation is itself informative. It also reflects a wider reality: many organisations working in areas such as safety, suitability, accessibility, fraud and privacy do not yet

frame their efforts explicitly in terms of social sustainability. Nonetheless, the insights gathered through responses, interviews and public sources reveal patterns that matter for the ecosystem at large and, to the best of our knowledge, can be applied across markets and media types.

Our analysis shows that social sustainability in digital advertising is broad, multi-layered and still maturing. While there is genuine progress and a growing field of promising initiatives, the industry lacks shared definitions, interoperable KPIs and governance structures strong enough to make social impact a routine part of media design, planning, optimisation and investment. As a result, important issues remain under addressed in day-to-day practice.

This report is therefore a starting point and a practical tool. It documents where current efforts concentrate, surfaces overlooked areas, and outlines priority opportunities for improvement. Above all, it is an invitation: to advertisers, agencies, publishers, technology providers, academics, and civil society partners to test, challenge and build on this work, and to help turn these first steps into workable standards that support healthier information environments and better social outcomes.

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Introduction

Digital advertising funds the online media environments through which people access information and entertainment, form opinions, and engage with society. This relationship makes the digital advertising ecosystem a pivotal arena for questions of **social sustainability** that concern not only what media is monetised, but how industry practices influence the quality, diversity, and integrity of the online media landscape.

This report explores how the digital advertising ecosystem currently addresses social sustainability, which areas are considered risks or opportunities, and how emerging approaches attempt to measure and manage them. It draws on responses to a Request for Information (RFI) developed by the **IAB Europe Sustainability Standards Committee** and includes a structured mapping of companies, initiatives, and solutions that seek to incorporate social impact considerations into media planning, verification, and investment decisions. Together, these inputs provide a cross-sectional view of where the ecosystem is experimenting, where it is aligned, and where it is facing challenges.

The ecosystem's interest in sustainability has grown in recent years, but the discussion has been heavily weighted toward **environmental impact**, particularly carbon emissions associated with the activation of digital advertising campaigns. While these efforts are important, they represent only one dimension of sustainability. A holistic ESG perspective requires that environmental, social, and governance considerations be assessed together, as intertwined factors that shape the long-term health of both markets and societies. According to the UN Global Compact, **social sustainability refers to the ways in which businesses and institutions “identify and manage their impacts on people.”**¹ It is an intentionally wide umbrella that covers diverse issues from community resilience and labour standards to information access and media environments.

Advertising investment has the potential to shape the information environment and generate externalities beyond commercial outcomes. By examining how the ecosystem currently approaches social sustainability, including tools, frameworks, standards, and emerging measurement practices, this report outlines both the progress made and the present limitations in terms of systematically supporting positive social outcomes.

¹ <https://unglobalcompact.org/what-is-gc/our-work/social>

Mapping Factors

Purpose	What is the goal of the initiative or solution? What is the problem it is trying to solve?
Stakeholders	Who steers the initiative or solution? How are different segments of the media supply chain involved? Are academic institutions, NGOs, or industry groups involved?
Impacts	Which social impacts are addressed and how? Do these map to broader frameworks or regulations?
Assessment	How does the assessment of media work in practice? Is it declarative or based on an audit? Is it owner, site, or page level? What kind of technologies are involved?
Transparency	How open is the process? How involved are the media owners that are being assessed? Are assessments made public?
Implementation	How do assessments practically affect media spend? What kind of technologies are involved?

Outcomes	Has the initiative or solution achieved measurable outcomes? Are these outcomes reported or reportable under regulatory or voluntary disclosure schemes?
Geography	Where is the initiative or solution active?
Challenges	What are the main obstacles for the initiative or solution?

Participating Organisations

The list is a non-exhaustive sample of companies and initiatives willing to share information on how they approach social sustainability topics and questions of digital advertising's societal impact.

Organisation	Description
Back to News	WPP Media initiative that aims to strengthen high-quality, trustworthy journalism by helping brands invest in vetted quality news ecosystems, contributing to a healthier public discourse.
Channel Factory	Video-level categorisation provider that launched the <i>Conscious Advertising Programme</i> , aimed at ensuring campaigns remain safe, contextually relevant, and performance-driven while contributing to broader goals of sustainability, inclusivity and responsible media support.
Future of News	Initiative of 32 publishers and industry leaders launched by <i>Stagwell</i> aiming to reframe news as a critical, brand-safe platform for advertisers.
GoodNet	ESG data company operating in the digital media industry. Developed <i>GoodIQ</i> , a product based on providing signals that can be used to plan, optimise, and measure towards a brand's desired blend of media performance and ESG metrics.

Organisation	Description
Initiative 18	Independent association calling for a diverse media landscape and the inclusion of free, safe, and sustainable media as the 18th Sustainable Development Goal of the United Nations (UN SDG 18).
Research Center for Sustainable Media & Marketing	Research Center founded at the International University of Applied Sciences (Germany) to provide a research-based management and measurement framework that makes the social impact of media and buying decisions transparent and consistently measurable.
Responsible Marketing Advisory	Responsible Marketing Advisory is a marketing consultancy that works with brands and publishers to change marketing, for good. They do this by creating best-in-class marketing strategies and operational plans, embedding responsible practices across the entire ecosystem.
Responsible Media Index	Index for benchmarking the sustainability performance of the German media landscape based on the <i>ESG Corporate Rating</i> of the international rating company <i>ISS</i> .
UseTheNews	Initiative investigating young people's use of and competence with news and developing new informational and educational offerings. <i>#UseTheNews</i> aims to provide children and young people across Germany with a reliable resource for safely handling information and forming fact-based opinions.

Purpose

The participating organisations' aims can be classified into four categories:

- Addressing topics relating to **consumers**, such as accessibility, privacy, media literacy, or the impact of media on vulnerable groups.
- Addressing topics relating to **content**, such as questions of societal role, plurality, coverage of underrepresented issues, content risk, and misinformation.
- Addressing topics relating to the media **supply chain**, such as ad fraud, transparency, and made-for-advertising sites.
- Addressing topics relating to a media organisation's **governance**, practices, and alignment with voluntary standards and/or regulation.

Organisation	Consumer	Content	Supply Chain	Governance
Back to News	×	✓	×	✓
Channel Factory	✓	✓	×	✓
Future of News	×	✓	×	×
GoodNet	×	✓	✓	✓
Initiative 18	✓	✓	×	×
Research Center for Sustainable Media & Marketing	✓	✓	✓	✓
Responsible Marketing Advisory	✓	✓	✓	✓
Responsible Media Index	✓	✓	×	✓
UseTheNews	✓	✓	×	×

Stakeholders

The organisations are classified based on their structure and the involvement of different segments of the media supply chain and external parties such as academic institutions, associations, or NGOs. Focus is placed on involvement at the leadership level rather than general collaboration or technical integration.

Organisation	Structure	Sellers	Ad tech	Buyers	External
Back to News (WPP Media)	For-profit	Audited		Clients	
Channel Factory	For-profit			Clients	WeAreBridge, Alliance for Inclusive & Multicultural Marketing
Future of News (Stagwell)	Initiative with publishers	Leadership		Clients	
GoodNet	For-profit	Clients			
Initiative 18	Association	Members			
Research Center for Sustainable Media & Marketing	Academic	Value Media Board operationalises research outputs			Founded at the International University of Applied Sciences, international academic partners
Responsible Marketing Advisory	For-profit	Collaboration on industry work		Clients	
Responsible Media Index	Open market initiative	Rated		Can purchase license to data	
UseTheNews	Non-profit	Board			Hamburg University of Applied Sciences, Leibniz Institute for Media Research

Impacts

The impacts that the organisations take into account when assessing media, or are otherwise focused on, can be classified into the following categories:

- Consumer-related impacts, such as effects on **vulnerable groups** (e.g. minors) and **privacy protection**.
- Content-related impacts, such as **societal value** (e.g. journalistic media powering democracy), **brand safety** or other content risks, and **copyright protection** (e.g. remuneration for AI content ingestion, copycat sites).
- Diversity-related impacts, such as **accessibility** and **representation** of diverse issues.
- Impacts related to media **organisations & practices**, such as the treatment of workers.
- Alignment with **voluntary standards** and **compliance with regulation**.

	Consumers		Content		
Organisation	Vulnerable Groups	Privacy Protection	Societal Value	Brand Safety	Copyright Protection
Back to News	×	✓	✓	✓	✓
Channel Factory	✓	×	✓	✓	×
Future of News	×	×	✓	✓	×
GoodNet	×	×	✓	×	×
Initiative 18	✓	✓	✓	×	✓
Research Center for Sustainable Media & Marketing	✓	✓	✓	✓	✓
Responsible Marketing Advisory	✓	✓	×	✓	×
Responsible Media Index	✓	✓	✓	×	×
UseTheNews	✓	×	✓	×	×

	DE&I		Organisation & practices	Alignment	
Organisation	Access	Representation		Voluntary	Regulation
Back to News	✓	✓	×	✓	✓
Channel Factory	×	✓	✓	×	×
Future of News	×	×	×	×	×
GoodNet	✓	✓	✓	✓	×
Initiative 18	×	×	×	×	×
Research Center for Sustainable Media & Marketing	✓	✓	✓	✓	✓
Responsible Marketing Advisory	✓	✓	×	×	✓
Responsible Media Index	✓	×	✓	✓	✓
UseTheNews	×	×	×	×	×

Assessment

Applicable only where organisations evaluate the desirability of different media from a social impact perspective, this section contains information on the **method** used to assess media, the **granularity**, and the **data source**.

Organisation	Method	Granularity	Data Source
Back to News	Independent audit, programmatic analysis	Site	Publisher data
Channel Factory	Programmatic	Content-level	Proprietary data
Future of News			
GoodNet		Site / app / bundle ID	Proprietary, 3rd party
Initiative 18			
Research Center for Sustainable Media & Marketing	Self-declaration, audit	Media owner / context level	Publisher data, 3rd party
Responsible Marketing Advisory	Self-declaration, audit by RMA	Case-by-case, determined by client tech stack, data availability	
Responsible Media Index	Self-declaration	Media owner level	Publicly available publisher data
UseTheNews			

Transparency

This section refers to the information that is publicly disclosed, **shared** with clients, or kept **private** across each organisation.

Organisation	Shared	Private
Back to News	Public criteria	Publisher portfolio shared with buyers, assessments are private
Channel Factory		Content categorisation shared with clients
Future of News	Aggregate research insights made public	
GoodNet	Summary & audit of methodology upon request	Data shared with clients and licensed to 3rd parties
Initiative 18		
Research Center for Sustainable Media & Marketing	Aggregate research insights, methodological guidance, benchmarks	Partner-specific assessments / audits
Responsible Marketing Advisory	Case studies	
Responsible Media Index	Methodology, documentation on rating, assessment rules, quality assurance	ESG ratings shared with clients
UseTheNews		

Implementation

The mechanisms through which the organisations aim to influence media spend or achieve other objectives can be classified into the following categories:

Organisation	Inclusion / exclusion list	Scoring / signals	Private Marketplace	Research	Awareness
Back to News	✓	✓	✓	×	✓
Channel Factory	✓	✓	×	×	×
Future of News	×	×	✓	✓	✓
GoodNet	×	✓	✓	×	×
Initiative 18	×	×	×	✓	✓
Research Center for Sustainable Media & Marketing	×	×	×	✓	×
Responsible Marketing Advisory	✓	✓	×	×	✓
Responsible Media Index	Depends on the consumer of data.			✓	×
UseTheNews	×	×	×	✓	✓

Outcomes

This section contains information on the success that has been achieved by the participating organisations in terms of managing social impact, delivering value, and otherwise achieving their intended outcomes.

Organisation	Outcomes
Back to News	<p>Test showed news inventory outperformed the benchmark, delivering increased:</p> <ul style="list-style-type: none"> • ad recall • purchase intent • brand trust • in credibility
Channel Factory	<p>Campaigns optimised through Channel Factory deliver:</p> <ul style="list-style-type: none"> • An average of 82% higher return on ad spend compared with general online video (independent ROAS study) • Achieve a 23% increase in targeting precision (PWC audit) • Reduce wasted media by around 30% (internal Content Strategy Audit results)
Future of News	<p>Research revealing ads adjacent to content considered "not brand safe" performed on par with ads next to "brand safe" content, and that news junkies view brands significantly more positively than the general public. Commitment to increase 2025 ad spend in news by 22% year-over-year.</p>
GoodNet	<p>6bn+ impressions optimised using GoodIQ data for over 200 brands. Inventory that scores in the top two quartiles against the ESG Media Index delivers on average:</p> <ul style="list-style-type: none"> • 27% reduction in CPC • 33% reduction in CPCV • 40% reduction in CPA • 18% improvement in Attention • 35% increase in brand consideration (note - smaller sample size)

Organisation	Outcomes
Initiative 18	<ul style="list-style-type: none"> • Inclusion of key demands such as a commitment to strengthening media diversity, fighting against disinformation and hate speech online, improved youth protection, and increased media literacy in the new German government's coalition agreement. • Involvement in the development of the UN Global Principles of Information Integrity and proposals to support public interest journalism in South Africa. • Support for EU-level complaints and lawsuits in areas such as youth and data protection, disinformation, and fair competition.
Responsible Marketing Advisory	<p>As a marketing consultancy RMA have worked with many large scale brands to support them within their responsible marketing some of the results include:</p> <ul style="list-style-type: none"> • Increased diverse media spend by working with more diverse media owners across markets from 4% to 11.5% over four years. • 20% increase in potential inventory without compromising brand safety for a client. • Embedding of accessibility into a global FMCG brand's advertising strategy. • Refreshing media partner guidelines to unlock additional 40%+ brand safe video inventory
Research Center for Sustainable Media & Marketing	<ul style="list-style-type: none"> • Conducted a survey of media budget allocation decision makers to assess the relevance of value media dimensions for media investment decisions. • Developed a measurement scale that captures impacts of media usage and user experience that provides a measurement foundation for ESRS S4. • Integrated a multi-stakeholder expert board with media companies, advertisers, researchers, and auditors. • Collected partner-specific audits, diagnostics, and research that will be used as the base for a generalisable auditing framework.

Geography

Where each organisation is active, and what is the geographical reach of any products.

Organisation	Geography
Back to News	Germany
Channel Factory	International
Future of News	International (US, EMEA, Canada, APAC)
GoodNet	International
Initiative 18	Founded in Germany, international scope
Research Center for Sustainable Media & Marketing	Hosted by IU in Germany, international network
Responsible Marketing Advisory	International
Responsible Media Index	Germany
UseTheNews	Germany, partners in Austria, Switzerland, the Netherlands, and the US

Challenges

The main challenges cited by participating organisations relate to:

- **perceptions** of different types of media, the importance of social impacts, and of the initiatives aiming to account for it;
- the **assessment** of social impact, including the representation of different effects using KPIs and the development of methodology that delivers the intended outcomes;
- the **implementation** of strategies to manage the social impact of advertising.

Perceptions	Assessment	Implementation
Close association of news media with brand risk despite empirical evidence suggesting KPI benefits.	Difficulty representing qualitative factors using KPIs.	Potential resource gaps for smaller publishers preventing engagement.
Connection between ad spend and the health of the media ecosystem is not as relevant to advertisers.	Variance in assessment due to jurisdiction and regulation, brand values, and audience.	Social impact KPIs given lower weighting compared to “harder KPIs” that drive spend to different media environments.
Change aversion and preference of reach over investment in quality media.	Complexity of subjective interpretation of content.	Delay between media planning decisions and social impact.
Uneven understanding of ESG across roles.	No shared taxonomy for key impacts.	Scale of content to be assessed and classified.
Low awareness of influencer compliance requirements and hesitation to enforce rules.	Difficulty in capturing causality or intermediate effects in a reliable way.	Preference for ad-hoc responses over system-level solutions.
Political backlash and cultural differences between markets.		
Indifference to news media among younger generations.		

Interview - Anni Lintula, IAB Finland

What can you tell us about your experience in media and your role at IAB Finland?

I'm the CEO of IAB Finland. My background is in media business development and the evolution of digital advertising. Previously, I worked at the media company A-lehdet, first as Business Director for youth media brands and later as B2B Director leading advertising sales. These roles gave me a broad understanding of how audiences engage with media and how sustainable digital business models are built. Nearly a decade in youth media also offered a unique perspective on how younger generations shape their understanding of the world in an increasingly digital environment.

In my role at IAB Finland I represent the entire digital advertising ecosystem. My focus is on promoting the sustainable growth and long-term vitality of Finland's digital advertising landscape.

To what extent do you believe the digital advertising ecosystem has societal impacts beyond its economic function — and which of these impacts do you consider the most significant, whether positive or negative?

I see clear positive and negative societal impacts arising from digital advertising. On the positive side, it remains a crucial revenue model for media companies, particularly in a digital-first environment. For a small country and language area like Finland, this model underpins a diverse media landscape and supports a wide range of journalistic perspectives. Advertising revenue enables stable digital business

models and helps safeguard the plurality of voices that a healthy democracy requires.

At the same time, dependence on advertising can generate distortions. When media companies rely heavily on digital advertising, the race for attention intensifies. Audiences become “eyeballs”, and the pressure to maximise clicks can influence editorial decisions. This may shape which topics are selected, how stories are framed, and even how headlines are written. The rise of more sensational or click-driven titles risks weakening journalism's democratic role.

Overall, digital advertising delivers essential funding for journalism, but its influence on content selection and presentation must be acknowledged and managed. Some larger Finnish media companies are developing additional consumer-based revenue streams, yet others remain significantly dependent on digital advertising.

Given that digital advertising underpins much of the funding of online media, how do shifts in advertising technology, data practices, and market structure influence the media's broader societal role — for example, in shaping public discourse, information quality, or trust?

I think the societal impacts are significant, particularly because advertising revenue has shifted away from domestic media towards large international platforms. As a result, many local media companies are seeing shrinking revenues, making it harder to

sustain high-quality journalism. This shift challenges the traditional funding model that has long supported a strong journalistic culture.

At the same time, we're seeing new media start-ups experimenting with alternative business models that rely more on consumer revenue than digital advertising. These players are trying to find new approaches to journalism and diversify revenue sources. However, for larger media organisations, the transition has been far from easy, as advertising spend continues to flow to other digital players.

Another major factor is how quickly consumer habits are changing. Finland has historically had high trust in journalistic media, but younger generations increasingly get their news from social platforms and are less willing to pay for journalism. This creates additional pressure in a small market where producing high-quality journalism remains costly and difficult to scale.

What is behind this change in consumer habits?

I think the main driver is the sheer increase in content competition. Young people consume a huge amount of material from social platforms, influencers, and peers, and much of what they consider "news" now comes through these channels. With only so many hours in a day, time spent on social platforms reduces both the time and willingness to engage with, or pay for, journalistic media.

It's not that people no longer value journalism; it's that they now have an

abundance of alternative content sources, including global news outlets that are easily accessible without a subscription. At the same time, household spending on digital entertainment and platform subscriptions has expanded. As a result, journalistic media faces intense competition for both attention and consumer budgets in an increasingly crowded content environment.

Among the societal effects that the digital ad ecosystem generates, which do you see the industry actively working to mitigate or improve? Conversely, which areas remain underacknowledged or insufficiently addressed?

I think one of the most under-discussed issues is the impact of large language models on journalistic media. Consumer behaviour is shifting rapidly, and people are increasingly accessing information through conversational interfaces rather than traditional search. This makes it even harder for media companies to attract readers to their own sites, which in turn undermines the advertising revenue their business models depend on. At the same time, these models draw heavily on the content produced by those very media organisations.

There is also a wider societal concern. Interactions with language models can create highly individualised information environments. Instead of joining shared discussions or community spaces, people are engaging in private, tailored conversations that can form personalised 'information bubbles'. This risks reducing the sense of shared reality that journalism is meant to support.

All of this is happening while media companies are still grappling with the challenges of the digital advertising ecosystem and trying to secure a sustainable share of revenue. Now the environment is shifting again, and the move towards individualised AI-mediated information flows makes it even more difficult for journalism to maintain viable business models. These challenges remain unaddressed in the digital advertising ecosystem.

Is there anything else that needs to be addressed at the industry level?

I think it's also essential to recognise the growing importance of media literacy. As the ecosystem shifts and language models become more integrated into everyday information flows, young people especially need stronger skills to navigate and assess content. Ensuring media literacy is embedded in education is increasingly vital.

For the industry, it's important to highlight why this matters and to help clarify the boundaries between commercial media and journalistic media. Strengthening media literacy supports a healthier information environment and helps maintain trust in journalism.

The boundaries between editorial and commercial influence are becoming more fluid in digital environments. How do you view this evolution — as a risk to editorial independence or as an opportunity for more sustainable media models?

From the perspective of journalistic media, I'm not overly worried because there is a

strong foundation of journalistic ethics and clear guidelines that separate editorial content from commercial influence. It remains crucial for the industry to maintain these boundaries despite commercial pressure and to be fully transparent about what is paid content and what is independent journalism.

The bigger challenge lies outside traditional media. Influencer marketing, for instance, operates in a far less regulated space. Many influencers work independently, often part-time, and may not be familiar with or committed to established transparency frameworks. This makes it much harder to uphold clear distinctions between promotional messages and authentic viewpoints. As a result, the environment has become increasingly messy, with blurred lines and inconsistent disclosure practices.

This complexity extends beyond influencers. With content flowing through social platforms and even conversational AI systems, audiences need stronger media literacy to critically assess what they encounter. At the same time, we cannot rely solely on journalistic organisations to uphold standards; many actors shaping today's information environment are outside the traditional media ecosystem.

Industry efforts are necessary, but insufficient on their own. Clearer political and societal engagement is needed to establish and enforce frameworks that help protect editorial independence and set transparent expectations across all forms of digital content.

The industry measures efficiency and ROI meticulously, but are there adequate ways to measure social or civic impact — and what might such metrics look like in practice?

This is a very difficult question, but an important one. When I think about it from the perspective of journalism's core mission, I do believe we need ways of measuring impact that go beyond business performance. Journalism exists to support democracy, safeguard equality, and act as a pillar of societal oversight. Yet the disruption of media business models has pushed much of the industry's focus towards survival and

revenue generation. That shift is understandable, but it means we discuss business metrics far more than the civic mission of journalism.

The challenge is that the democratic function of journalism is hard to quantify. It is deeply connected to how well society is informed, how public debate functions, and how institutions are held accountable. I don't yet have an answer for what such metrics should look like, but I think it is essential that we begin talking about them. If journalism is a cornerstone of democracy, then finding ways to reflect that mission in how we measure impact is increasingly necessary.

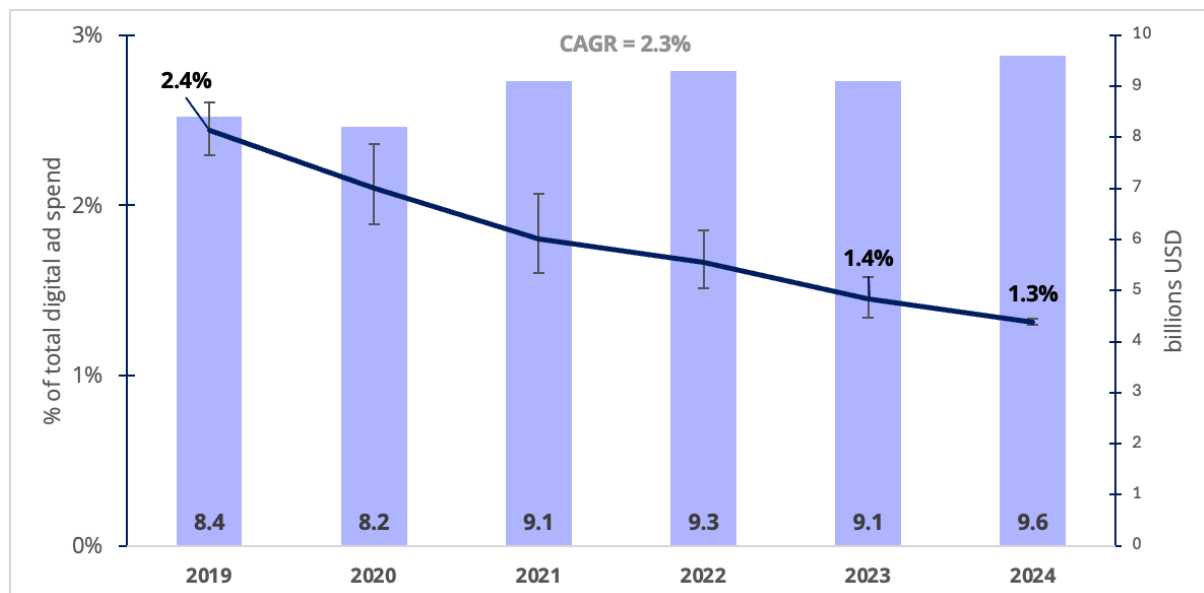
Relevant Work

Both the mapping and interviews reveal multiple areas of social impact that are already the subject of industry work, research efforts, and collaborative initiatives. This section is dedicated to highlighting previous work and findings that provide context on these areas.

Ad spend trends

Financing media that contribute to social goods was a key theme across stakeholders, although the sample was mostly focused on the relationship between news media and effects in the areas of plurality and informational integrity. While the total ad revenue of online newsbrands has grown over the past 5 years, it has grown slower than ad spend overall. More broadly, since the end of 2019 global spend on content media has been overtaken by spend on search, social media, retail media, and digital pure players.²

Ad revenue - online newsbrands, global



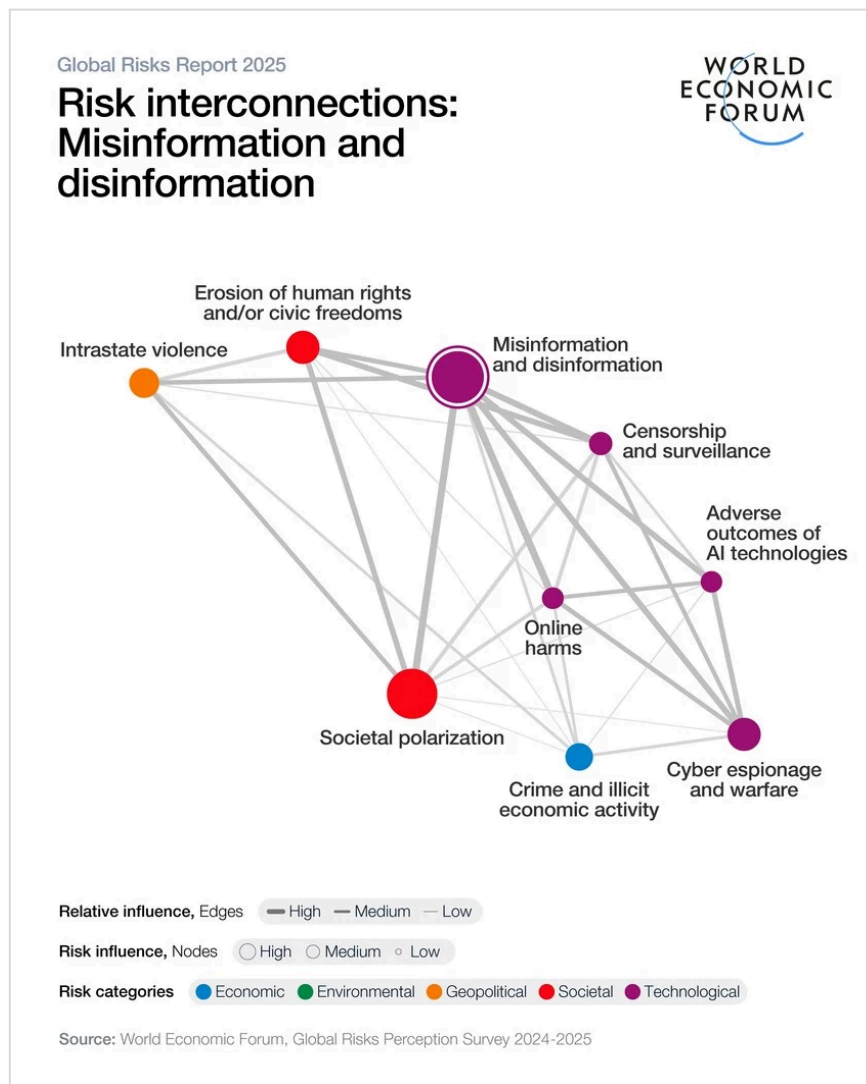
Sources: WARC Media, IAB Europe

Growth data shows that in the 5-year period between 2019 and 2023, the annual growth of ad spend directed towards online news media trailed the growth of total

² WARC, IAB Europe, "Content media" defined as TV & CTV, newsbrands (online & offline), magazine brands (online & offline), Audio (radio & digital streaming), Cinema

digital ad spend by an average of 13 percentage points, dipping into the negatives in 2020 and 2023. In the same period, the proportion of online newsbrand ad revenue to total digital ad spend declined from about 2.4% to about 1.4%.

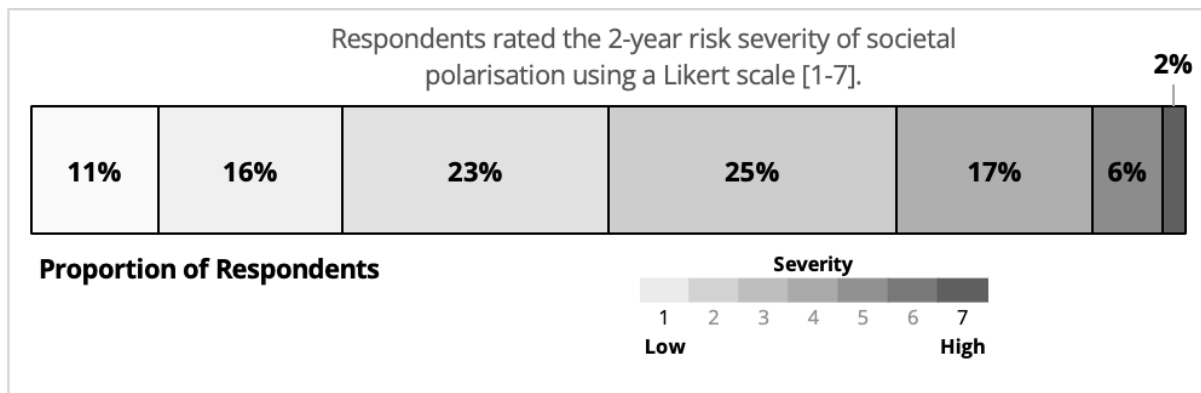
Information Risks and Societal Polarisation



Global risk assessments indicate that misinformation and societal polarisation are among the most acute short-term threats, underscoring their relevance for media and advertising ecosystems. These risks were presented in connection to algorithmic bias and reduced barriers to content production and distribution as a result of advancements in generative AI. Suggested solutions include upskilling, investment in digital literacy, and improved governance frameworks.³

³ World Economic Forum, Global Risks Report 2025

Perceived 2-year risk severity of societal polarisation



Source: World Economic Forum Global Risks Perception Survey 2024-2025

AI and Intellectual Property Tensions

One of the interviews surfaced the connection between the rapid emergence of AI-driven interfaces and new uncertainties for publishers, particularly regarding compensation for journalistic content and the protection of editorial integrity. In 2023, Reporters Without Borders and 16 partner organisations published the Paris Charter on AI and Journalism calling for both just compensation of rights holders and journalists, as well as conditions regarding the integrity of information and journalistic ethics.⁴ Larger publishers have been able to address such concerns through bilateral agreements with the developers of AI systems, and active industry initiatives aim to support more publishers in managing AI content access. However, without solutions that are accessible beyond the largest market participants, there is a risk that AI-driven distribution models could further concentrate revenue and undermine the financial stability of a broad and diverse online media landscape.

Disinformation Ecosystems

Analysis by civil society organisations shows that harmful narratives continue to circulate at scale, often amplified by domestic political actors and foreign influence operations. In Germany, one of Europe's largest digital markets, the Global Disinformation Index has examined the potential societal effects of such narratives, including their impact on civic integrity and immigration debates. Increases in anti-immigrant and Islamophobic discourse have, for example, been observed alongside higher reported incidents of xenophobic hate crimes. GDI estimates that

⁴ Reporters Without Borders, Paris Charter on AI and Journalism, 2023

domains it identifies as spreading disinformation generated around 3.6 billion page views in 2024, underlining both the reach of this content and the commercial value attached to audience attention at scale. GDI itself has faced criticism over perceived bias and the potential impact of its ratings on certain publishers, and it no longer maintains a publicly accessible exclusion list. These debates reflect the broader challenge of establishing shared, transparent content criteria without undermining a plural and resilient information environment. Also relevant are made-for-advertising sites, often designed to maximise engagement and advertising revenue through high volumes of low-quality but emotionally resonant content that may overlap with misinformation and disinformation narratives.⁵

Challenges in Qualitative Measurement

Efforts to define and measure qualitative dimensions of media value reveal persistent difficulties in producing signals that capture social impact without introducing bias. Producing signals that effectively represent “softer” impacts without introducing bias is considered a difficult task across the digital ecosystem. “Measurability arises through clarity, i.e., clean definitions,” said Professor Lisa-Charlotte Wolter, Head of the IU Research Center for Sustainable Media & Marketing, when asked about representing qualitative factors alongside traditional, “harder” KPIs in a recent interview. The RCSMM is the only academic initiative that was captured in the mapping, and it continues to work with its Value Media Board to operationalise media social impact KPIs. “In other KPI-driven contexts, qualitative aspects are already standardised and managed alongside hard financial figures. Brand equity in brand management, for example, is a multidimensional construct that is linked to financial key figures in practice.”⁶

Parts of the advertising industry have also pushed back against signals expressing qualitative factors, such as brand safety, arguing that certain environments, e.g. high-quality news, are suitable for advertising despite high rates of blocking. A recent study by UK agency Bountiful Cow, based on a live A/B test where brand safety filters were disabled on one of two media lines across four premium UK news publishers, supports this claim. While the sample was described as relatively small, inventory considered to be unsafe achieved better attention scores and led to an average brand lift improvement of 22 percentage points.⁷ The agency claims that advertisers are losing

⁵ GDI, State of Disinformation: Germany, June 2025

⁶ Interview with Lisa-Charlotte Wolter, Catrin Bialek, Horizont

⁷ Bountiful Cow, Relative Advantage Unblocked

out on cheaper and more effective advertising due to blocklisting practices, pointing to both improved metrics across inventory deemed unsafe, and the 40% reduction in media supply caused by blocklists across the Ozone media network.

Some development efforts for frameworks to measure the qualitative elements of online media and capture social impact, and examples of data solutions that have informed live campaigns are captured in the mapping. However, there is no universal standard for digital advertising solutions that aim to measure and manage social impacts. Standards do exist for brand safety tooling, although these are still evolving. For example, the Media Rating Council recently introduced a policy that requires vendors to develop content-level capabilities before positioning their services as brand safety solutions and has stated it will not be providing new accreditations without clear commitments for the development of content-level analysis capabilities for video, images, and audio. This reflects a growing distinction in the industry between safety, i.e. avoiding environments that pose direct reputational or regulatory risk, and suitability, which focuses on alignment with a brand's values. While content-level analysis is now necessary for brand safety claims, property-level tools may continue to play a role in suitability strategies, where broader contextual signals can still provide value. These developments highlight the need for clearer terminology and shared expectations if advertisers are to balance risk management with support for a diverse and socially valuable media ecosystem.

Ad Fraud and Economic Leakage

Despite ongoing countermeasures, a share of global ad spend continues to be lost to fraud. While estimates vary on the total size of the problem, most sources cite that 15% to 25% of total ad spend is lost to fraud. Certain CTV and mobile in-app environments are more heavily affected by fraud, and changes to industry standards, such as the introduction of device attestation into the IAB Tech Lab Open Measurement SDK, aim to facilitate better verification as a countermeasure. Although the digital ad ecosystem continues to fight ad fraud, evidence suggests invalid traffic rates have increased. According to Pixalate, the ratio of global desktop and web traffic that is invalid has doubled in the span of two years (Q3'23 to Q3'25) and currently sits around 20%.⁸ When substantial spend is diverted to fraudulent supply, fewer resources reach reputable publishers, limiting investment in high-quality content and weakening the broader social value that trusted media can provide.

⁸ Pixalate Global Invalid Traffic & Ad Fraud Benchmarks, Q3 2025 & Q3 2024

Interview - Dr. Michael Fretschner, NORDAKADEMIE

Could you please introduce yourself?

I am a professor of e-commerce and marketing at NORDAKADEMIE University of Applied Sciences, a leading business school in northern Germany, where I have been teaching and conducting research since 2019. My work spans several areas within digital marketing, with a particular focus on media brand trust and its influence on advertising effectiveness.

To what extent do you believe the digital advertising ecosystem has societal impacts beyond its economic function — and which of these impacts do you consider the most significant, whether positive or negative?

Digital advertising has become the dominant form of advertising, shaping not only markets but society more broadly. Its societal role is significant. One of the most pressing issues is the underfunding of a diverse range of media outlets. As advertising revenue concentrates elsewhere, many news and magazine publishers struggle to sustain themselves, reducing the plurality of information sources that a healthy democracy relies on.

Environmental considerations also matter. While channels such as print carry clear environmental costs, digital advertising is not impact-free. Every digital ad, email, or campaign consumes energy, and there is not enough awareness across the industry.

Advertising also influences social norms and values. Creative work reaches billions of

people each day. Beyond raising awareness for products, advertising tells stories, conveys values, and shapes cultural narratives. It affects what becomes socially desirable and contributes to the zeitgeist. Sometimes this is intentional, as seen in purpose-driven marketing; often it happens unconsciously, simply through repeated exposure to brand messages in the environments where people consume news and entertainment.

Given that digital advertising underpins much of the funding of online media, how do shifts in advertising technology, data practices, and market structure influence the media's broader societal role — for example, in shaping public discourse, information quality, or trust?

Even before the rise of today's major technology platforms, media markets were never perfectly balanced. Large publishers and influential media groups held substantial power and often operated in close proximity to political interests. But the landscape has shifted dramatically. The dominance of a small number of global platforms has created a far more concentrated and opaque ecosystem.

These companies now control multiple layers of the media supply chain, and their position gives them influence over what content is produced, distributed, and monetised. This reshapes public discourse simply because so many people spend most of their online time within these proprietary environments.

A core concern is the opacity of content algorithms. Personalised feeds determine what each individual sees, yet the mechanics behind those decisions are neither visible nor accountable. During the COVID-19 pandemic, for example, platforms removed or suppressed discussion of a hypothesis around the origin of the virus that is now, years later, considered viable and worthy of investigation. Decisions like this show how content moderation at scale can narrow the boundaries of acceptable debate.

At the same time, audiences are moving away from traditional news sources, which generally offer clearer editorial structures and more predictable content hierarchies. When content discovery shifts to algorithmic systems that users cannot evaluate or control, the result is not only a loss of agency but also a decline in trust. Our recent research shows that social platforms consistently score the lowest on trust, with short-form video and social networks at the bottom of the rankings.

Among the societal effects that the digital ad ecosystem generates, which do you see the industry actively working to mitigate or improve? Conversely, which areas remain underacknowledged or insufficiently addressed?

Despite a decade of debate, little has changed in addressing the societal effects of digital platforms. One example I mentioned earlier is the way platforms can reduce the reach of posts that do not align with their preferences, quietly shaping what users see and what effectively becomes part of public discourse.

The impacts on young people are also concerning. Research, such as work by Jonathan Haidt, links heavy social media use to rising levels of anxiety, depression, and other mental health challenges among teenagers, especially young women. These concerns have prompted discussions in several countries about restricting social media access for those under 16. Psychologists consistently highlight the negative effects of excessive screen time, from poor sleep to social withdrawal.

A further issue is exposure to misinformation. These platforms operate outside traditional editorial structures and are not held responsible for the accuracy of the content they distribute. As user-generated content flows through uncurated feeds, young users in particular face a constant stream of unreliable or misleading information.

Frameworks focused on brand safety, sustainability, and responsible media seek to guide media investment patterns. What kinds of effects do they have in practice, and how closely do those effects align with their intended aims?

Brand safety has been a major focus for years, and the frameworks in place generally work well. They ensure that advertising does not appear alongside harmful or illegal content. However, brand safety is not the same as brand suitability, and it does not inherently address sustainability or responsible media considerations.

Environmental sustainability is a different challenge. Initiatives aimed at reducing the

carbon footprint of digital advertising gained momentum several years ago, but in some markets the peak of that engagement may already have passed. Responsible media frameworks attempt to shift attention from environmental concerns towards broader societal questions such as the importance of supporting diverse, independent media.

There are strong voices arguing that advertisers and agencies should direct more investment to local and quality news outlets, which play a crucial role in democratic life. Yet meaningful change has been limited. What is changing is the regulatory environment. Policymakers in Europe are increasingly aware that media ecosystems are not just economic infrastructures but key components of a functioning democracy. Recent competition actions, regulatory proposals, and debates about youth exposure to digital platforms all point toward a growing willingness to intervene. Change may be slow, but the practical impact of these frameworks and regulations is gradually increasing.

The boundaries between editorial and commercial influence are becoming more fluid in digital environments. How do you view this evolution — as a risk to editorial independence or as an opportunity for more sustainable media models?

The boundary between editorial and commercial content has become increasingly fluid from the user's perspective. When scrolling through digital platforms, the transition between journalism, entertainment, and advertising is almost seamless. Most users do not actively distinguish between these forms

unless they deliberately pay attention. This convergence is not necessarily new, but digital environments have intensified it.

The larger issue is that publishers producing high-quality editorial content are not adequately compensated when their work appears within social feeds. Users may encounter an article or video in a platform's interface, yet they rarely click through to the publisher's site and in many cases they cannot because outbound links are restricted or deprioritised. The result is significant loss of traffic and revenue. A similar pattern can be seen in AI-driven search experiences, where users receive summarised information without needing to visit the original source. These "zero-click" environments undermine the business model that sustains rigorous editorial work.

The industry measures efficiency and ROI meticulously, but are there adequate ways to measure social or civic impact — and what might such metrics look like in practice?

This is an important question because many of the metrics used in media planning are inherently short-term. They capture immediate outcomes, but they tell us little about the broader social or civic effects of advertising. In our research on media trust and advertising effectiveness, we focused instead on marketing-level indicators such as media brand trust, ad acceptance, and behavioural responses to advertising.

We examined measures like ad avoidance, where users actively try to skip or ignore ads, versus ad acceptance, where advertising is perceived as appropriate or

even helpful. Patterns vary significantly by platform. Ad avoidance is particularly high on video and social media platforms, where users skip ads whenever possible. In contrast, news environments tend to attract much higher levels of ad acceptance. People understand that journalism is funded by advertising, and they perceive ads in trusted editorial settings as more relevant and more aligned with the surrounding content.

These types of indicators offer a more meaningful way to assess the societal impact of media environments, because they reflect how people feel about the role of advertising in the spaces where they seek information.

Looking ahead, what kinds of industry standards, frameworks, or policy interventions do you believe are most needed to ensure that the digital ad ecosystem evolves in a socially responsible way?

A central priority for the coming years is strengthening digital sovereignty. Europe relies heavily on foreign technology providers, which leaves core digital infrastructure, including the systems that power media and advertising, vulnerable to external decisions. Recent political developments and geopolitical risks have increased awareness that this dependency carries economic and democratic implications. As governments push for greater technological independence, there is an opportunity for the media and advertising ecosystem to benefit from a more resilient, locally anchored digital foundation.

Another important intervention concerns regulatory parity. Traditional media sectors operate under long-standing rules that limit market concentration to preserve plurality, yet comparable safeguards do not exist in the digital space. Dominant platforms can hold overwhelming market shares in areas that function much like television or publishing, but without the constraints applied to those sectors. Establishing equivalent competition rules for digital environments would help ensure that no single actor controls too much of the value chain.

Artificial barriers within platform ecosystems also demand attention. Restrictions on outbound links, for instance, keep users inside closed systems and deprive publishers of traffic and revenue. These walled gardens undermine sustainable business models for quality editorial content. Interventions that protect openness would support healthier competition and a more diverse media ecosystem.

Finally, some monopolies naturally emerge in network-driven markets, but problems arise when dominant players extend their scope into adjacent areas, use closed standards to entrench power, or give preferential treatment to their own services. In these cases, external oversight is essential. Industry-led efforts have not been sufficient; progress requires firm regulatory action aimed at maintaining plurality, protecting democratic functions, and ensuring fair conditions for all market participants.

Discussion

While the mapping reveals progress and promising initiatives, several structural limitations continue to prevent the ecosystem from managing social impact in a consistent and scalable way.

1. Universal standard and KPIs

In the absence of shared definitions and interoperable KPIs, advertisers cannot apply social-impact considerations consistently across markets or buying environments, and media owners struggle to demonstrate the value of socially beneficial content in ways that influence investment decisions. A responsible media framework therefore needs to support comparable evaluation across tools and geographies while remaining feasible for organisations with differing levels of resources. Although various initiatives and a small number of live solutions that capture social impact exist, the lack of methodological alignment prevents equivalence and comparability. Furthermore, equivalent assessment is contingent on an extensive mapping of the social goods associated with different types of media. As a result, scalable, ecosystem-wide internalisation of social impact remains out of reach. A framework capable of capturing social impacts consistently would need to define and specify:

- boundaries, i.e. the areas of social impact that are addressed;
- transparent criteria for classification and scoring;
- KPIs capturing the qualitative factors of media;
- acceptable methods for evaluating the social impact of different media types;
- auditability and oversight requirements.

2. Media supply chain impacts

The social impact of media buying extends beyond the media itself. How media is bought, from planning decisions to the tooling used to activate campaigns, needs to be considered for a holistic approach. Firstly, any framework accounting for social impact needs to be implementable within current transparency and verification constraints. Operationalisation through methods such as inclusion and exclusion lists, scoring, and PMPs relies upon a baseline level of visibility into media purchases. Secondly, there are issues specific to the media supply chain, such as preventing fraud and preserving user

privacy, that must be addressed in parallel. Rapid technological evolution also affects the revenue outlook for media with recognised social value, as new intermediaries, interfaces, and distribution models can alter traffic flows and weaken the commercial foundations of high-quality media. Other impacts tied to users or organisational practices extend beyond what can be inferred from media-specific proxies (e.g. reach, ad acceptance) and require supplementary inputs such as enterprise-level ESG data. Finally, fully accounting for certain aspects of social sustainability requires greater cross-ecosystem collaboration. Accessibility, for example, depends not only on how ads are produced but also on the environments in which they appear, illustrating the need for aligned practices across platforms, publishers, and advertisers.

Mentions of Social Impact Areas in Corporate Reports

	Platforms	Advertisers	Ad Tech	Publishers	Agencies
Privacy Protection	50	15	30	20	10
Diversity, Equity & Inclusion	30	30	15	20	20
Societal Value	20	20	8	15	15
Vulnerable Users / Consumers	30	15	2	5	5
Brand Safety	15	5	20	5	10
Intellectual Property & AI	20	5	5	5	5
Accessibility	15	10	2	5	5

Source: AI analysis of latest annual / ESG reports across 50 global companies

3. Buy-in and scalability

Efforts to measure and manage the social impact of digital advertising face structural constraints that limit their ability to scale beyond isolated pilots or specific markets. Commercial incentives are a core barrier: publishers with limited resources may find it difficult to adopt additional measurement or verification requirements, while advertisers may not perceive a clear incentive to prioritise social impact beyond considerations such as brand suitability. At the same time, the global nature of digital advertising introduces discrepancies in regulatory environments, cultural expectations, and transparency, which complicate the development of standards that are workable across markets. A framework that aims to advance social impact, therefore, needs to be supported by aligned incentives for adoption and designed in a way that can be consistently applied across varied market conditions while remaining sensitive to local contexts.

4. Parity across media types

A theme that emerges consistently from the mapping and interviews is the lack of parity in regulation, assessment, and advertiser perceptions across different types of media. These disparities stem from differences in regulatory obligations, the uneven availability of verification and transparency infrastructure, and longstanding assumptions about the relative risk or suitability of specific media environments. As a result, media channels are not evaluated on a comparable basis, which can lead to underinvestment in formats that contribute to information diversity or other social goods. This asymmetry affects how budgets flow across the ecosystem and limits advertisers' ability to optimise for social outcomes using coherent, cross-media signals. Addressing this gap requires stakeholders to adopt consistent, evidence-driven expectations and measurement approaches that allow media choices to be evaluated on equivalent terms while recognising legitimate differences between formats.

Conclusion

Across topics like brand safety, privacy, fraud prevention, and accessibility, stakeholders are investing in tools, frameworks, and collaborative initiatives that seek to manage risk, improve performance, or protect commercial interests. While many of these efforts are not explicitly tied to social objectives, they nonetheless carry implications for the quality and resilience of the information environments in which societies form opinions, debate issues, and exercise democratic choice. Viewed through the lens of social sustainability, these developments underscore the need to understand and steer industry practices in ways that support media ecosystems with positive social outcomes.

At the same time, the analysis highlights the limits of working in isolation. Measurement approaches remain fragmented, and incentives to adopt social-impact criteria are unevenly distributed across markets and the supply chain. Without coordinated progress on standards, transparency, and interoperability, responsible media buying risks remaining confined to pilots and individual campaigns rather than scaling into everyday practice.

Achieving meaningful progress requires uniting the digital ad ecosystem around the shared objective of ensuring that media investment supports environments that deliver improved social outcomes. This entails achieving consensus on KPIs that function consistently across formats, geographies, and buying environments, and that accurately reflect qualitative dimensions of media without introducing bias against particular types of media owners. Such standards would enable advertisers to manage the social impact of their campaigns with confidence and media owners to demonstrate the value of socially beneficial content.

Crucially, responsible media buying should not be understood simply as avoiding harmful content. It must also involve assessment of buying practices across multiple potential areas of social impact, such as safety, privacy, fraud, or accessibility, to the end of directing investment toward media that generates demonstrable public value alongside performance. Progress will depend on establishing standards that are technically robust, operationally feasible, and supported by clear incentives across the supply chain. Only with consistent measurement and accountable governance can responsible media buying become a systemic feature of the ecosystem, ensuring that advertising spend reinforces a healthy media environment.

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