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FOR A SUSTAINABLE  
SECTOR



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Annual Report 2022

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## The year in review

2022 was a year of action for media companies. As societies learned to live with Covid-19 and opened up again, the sector was able to return to some facets of the pre-Covid world, such as more content creation, in-person events and meeting face-to-face. From a sustainability perspective, climate change and biodiversity loss were high on the agenda in 2022, driven in part by COP27 in Sharm-el-Sheikh and the release of various IPCC reports furthering our understanding of the climate crisis, and COP15 in Montréal where the post-2020 framework to tackle biodiversity was finally agreed. Internally, significant strides were made by media companies as they made progress towards the ambitious targets set in previous years and improved and expanded their measurement of Diversity, Equity and Inclusion (DEI) and Greenhouse Gas (GHG) emissions amongst other metrics. By the end of 2022, 62 media companies had committed to science-based targets, 26 of which are now approved to align with the business ambition for 1.5 degrees.

26  
participating  
media  
companies ...

Media remains a platform for inspiring the world to change, and after 10 years of talking sustainability in content at the [Mirrors or Movers](#) conference, we have made some inroads within the collective brain print. There are, however, still barriers that need to be overcome.

81 in-person  
conference  
attendees.  
288 views on  
YouTube.

As Gaby Hornsby, Content Editor and TV Lead for Sustainability at the BBC was reflecting on the last 10 years of impact at the BBC, she said explained that *“Our remit is fundamentally, to Inform, Educate and Entertain. When we hit the sweet spot then these three principles are incredibly powerful, we are able to inspire audiences when they make choices for themselves, for society and for the planet. When we do this at scale, we can open up the space for national conversation about who we are and what we want.”*

As the world reset from the pandemic, Emma Stewart, the inaugural Sustainability Officer at Netflix mentioned that media should ‘entertain to sustain’ with many Netflix consumers, over 160 million households in 2020, having chosen to watch at least one story that shone a light explicitly on sustainability and at least two thirds of these people would like to see more. As Peter Kareiva, a conservation scientist, mentioned “Science tells us what to do, whilst storytelling makes us want to do it”. You need both, and in many ways the climate and sustainability field has failed to recognise the importance of narrative and emotion, which instead, has bought charts and graphs and does not galvanise action.

Like last year, our quarterly meetings continued virtually, addressing prominent topics such as the investor perspective on climate change, DEI in media, human rights in broadcast and publishing value chains, and nature and biodiversity. We concluded our research on materiality in the media sector, (more on page 3) and completed a benchmarking survey (more on page 4).

**Benchmark  
survey with  
182  
indicators**

We held our tenth edition of Mirrors or Movers, where we heard from high-profile speakers including Emma Stewart (Sustainability Officer at Netflix); Martyn Freeman (COO at BBC Studios); Jonathan Wise (Co-Founder at Purpose Disruptors); Lea Eberle and Stefan Mair (EqualVoice); Denise Baden (Professor and Author at the University of Southampton) to name a few.

The activities of the Responsible Media Forum reflect and respond to many of the sector's most pressing issues through discussions, events, working groups and research. This Report provides a summary of our activities in 2022 and plans for 2023. We hope you enjoy it.

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*Participation in the Forum is open to large media companies operating anywhere in the world and in any media sub-sector(s). We are open to new participants, so if you are interested in joining, please get in touch: [info@responsiblemediaforum.org](mailto:info@responsiblemediaforum.org) / +44 (0) 7384518837.*

## Research and publications

### Media Materiality Report 2022

We carried out a materiality exercise to better understand the material issues since our last report in 2018. This research was conducted with three 'building blocks' with each step building upon the foundations of the previous one. A desk-based review of Environmental, Social & Governance (ESG) reporting frameworks, investor indices and recent materiality assessments published by RMF participant companies. Interviews were held with senior sustainability practitioners from media companies. And finally, interview with external experts including ESG thought-leaders, investors, policymakers, Non-Governmental Organisations and third sector.

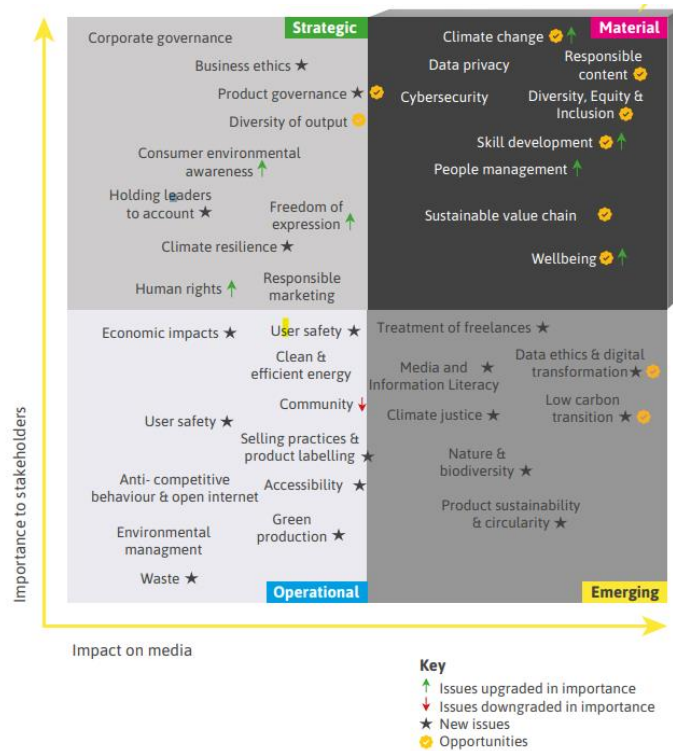


From this research, all the material issues identified were mapped out into a materiality matrix and banded into four issue categories: material, strategic, operational, and emerging.

Two new material issues for the media sector coming out of this research were 'Cybersecurity' and 'Sustainable Value Chain'. 'Climate Change', 'Responsible Content', 'Diversity, Equity & Inclusion' and 'Data Privacy' came out as the top material issues.

While most of the research for this report was carried out in 2021, it was finalised in Q1 2022 and published in March 2022.

We hope that this materiality assessment is a useful snapshot of what is important for responsible media companies in these dynamic and volatile times. A full report summarising the findings from this research is available [here](#).



## Benchmarking Survey 2022

This year we carried out a benchmarking survey for the participating companies with 17 respondents. The survey explores how media companies are resourcing sustainability and where the sustainability function sits in the corporate structure; their policies, programmes and objectives across various issue areas; their reporting; the targets they have set and performance against those; and their partnerships. It was the first benchmark we carried out since 2018, with a vastly expanded scope to reflect the expansion of the sustainability topics companies are expected to consider. It focused on a core set of questions which included 8 sections: about your organisation, workplace flexibility, governance, equity, diversity & inclusion, climate & environment, content, commitments, and reporting.

As usual, the data presented was kindly shared by RMF participants in the spirit of collaboration for the use within the RMF only. Therefore, none of the results have been published publicly.

## Forum meetings

Forum meetings are held on a quarterly basis, focused issues and topics of interest relevant to the RMF participants. Experts are invited to present their insights, followed by group discussions under the Chatham House rule. These insights and discussions are designed to help support and inspire each participants' own work.

### Q1 | Climate Change: The Investor Perspective



Main meeting

**Garrett Quinn**

*Group Chief Sustainability Officer, Smurfit Kappa Group PLC*

Specialist Session: TCFD, New European Legislation and Sustainability Data Analysis

### Q2 | Diversity, Equity and Inclusion



Main meeting

**Vikki Cook**

*Director Broadcast and Content Media Policy, Ofcom*

Working Group: Offsetting

Specialist Session: Human Rights for broadcast, publishing and beyond

TV INDUSTRY  
HUMAN RIGHTS FORUM









**Amelia Knott**, Lead researcher, TVIHR Forum



**Hattie Godber**, Partner, Carnstone

## Q3 | Mirrors Or Movers X Conference

*A one-day conference with sessions held on Ten Years of brainprint, reflecting on a decade of media's role in society and looking ahead to the future.*

<p><b>Session 1</b></p>	<div style="text-align: center;">   <p>Ten Years of Impact across the BBC  <b>Gaby Hornsby</b>  <i>Content Editor &amp; TV Lead for Sustainability, BBC</i></p> </div>			
<p><b>Session 2</b></p>	<div style="text-align: center;">   <p>Equal Voice: Improving the representation &amp; portrayal of women in articles  <b>Lea Eberle</b>  <i>Project Manager Finance, Ringier AG and Head of Strategy, EqualVoice</i></p> <p><b>Stefan Mair</b>  <i>Journalist &amp; Podcaster, Handelszeitung</i></p> </div>			
<p><b>Session 3</b></p>	<div style="text-align: center;">   <p>The Role of Advertising in a Net Zero World  <b>Jonathan Wise</b>  <i>Co-Founder, Purpose Disruptors</i></p> </div>			
<p><b>Session 4</b></p>	<p style="text-align: center;">Inspiring green behaviour through stories</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td data-bbox="355 1572 879 1848" style="width: 50%; text-align: center;">   <p><b>Denise Baden</b>  <i>Professor of Sustainable Business and Author, Univeristy of Southampton</i></p> </td> <td data-bbox="879 1572 1398 1848" style="width: 50%; text-align: center;"> <p><b>LAUREN JAMES</b>  <small>WRITER &amp; LECTURER</small></p> <p><b>Lauren James</b>  <i>Author, Writer and Lecturer</i></p> </td> </tr> </table>		 <p><b>Denise Baden</b>  <i>Professor of Sustainable Business and Author, Univeristy of Southampton</i></p>	<p><b>LAUREN JAMES</b>  <small>WRITER &amp; LECTURER</small></p> <p><b>Lauren James</b>  <i>Author, Writer and Lecturer</i></p>
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<p><b>Session 5</b></p>	<p style="text-align: center;"><b>NETFLIX</b></p> <p style="text-align: center;">Storytelling &amp; Partnerships  <b>Emma Stewart</b>  <i>Sustainability Officer, Netflix</i></p>
<p><b>Session 6</b></p>	<p style="text-align: center;"><b>BBC STUDIOS</b></p> <p style="text-align: center;">Closing Remarks  <b>Sally Mills</b>  <i>Head of Sustainability, BBC Studios</i></p>

**Q4 | Nature & Biodiversity**



**Thomas Vellacott**  
*CEO, WWF Switzerland*

**Rebekah Church**  
*Global Lead Biodiversity Stewardship, WWF*

Working Group: Offsetting



## Working groups

The Forum occasionally supports specialist working groups to address key issues of interest to certain participants. This year, we held two sessions for an ongoing working group on Carbon Offsetting. This group's work has concluded with a Carbon Offsetting Guidance for the Media Sector, which includes common definitions of key terms; the role of offsets in corporate climate strategies; a checklist to evaluate the quality of offset projects; and appendices on the content of voluntary offset standards and potential challenges to offset quality. We also held specialist sessions throughout the year on TCFD climate scenarios; new European Regulation through the EU Taxonomy; Sustainability Data Analysis; and Human Rights.

In 2023, we will be refocusing the working group towards net zero and decarbonisation, with a focus on the supply chain.

## The Media Climate Pact

The [Media Climate Pact](#) is a coalition of media companies committed to tackling climate change through two major commitments: one operational and one focused on content. All signatories have set a net zero target and the majority have met the operational commitment to implement science-based targets on climate. Similarly, significant progress has been made in content, with signatories providing internal training opportunities, launching sustainability-related campaigns, and integrating climate-related content across their portfolios.

The efforts of these leading media companies to reduce their own emissions and drive wider behaviour change towards climate-friendly lifestyles is encouraging and we hope to inspire media companies to join us in our effort to tackle climate change.

The Pact remains open for more signatories in 2023.

## DIMPACT

[DIMPACT](#) is a collaborative project involving 26 media companies and understanding the environmental impacts of digital media.

An online tool has been created to calculate the carbon emissions of digital content downstream, together with world-class computer



science researchers from the University of Bristol and Carnstone providing secretariat services.

2022 saw the addition of 7 new companies, the introduction of an expert advisory panel, the creation and release of a publicly available [methodology](#), and the development of new a new video conference module within the tool.

Whilst the tool remains at the centre of DIMPACT, industry collaboration to drive carbon reductions across the value chain is becoming an increasingly important part of the project. Once such piece of research was performed which came about from the Devices Manufacturer working group. Together with the DTG, the UK's leading TV tech testing house, we measured the consumption behaviour on a range of devices and compared these to the EU energy labelling database. This will inform future discussions in reducing the carbon impact of digital services.

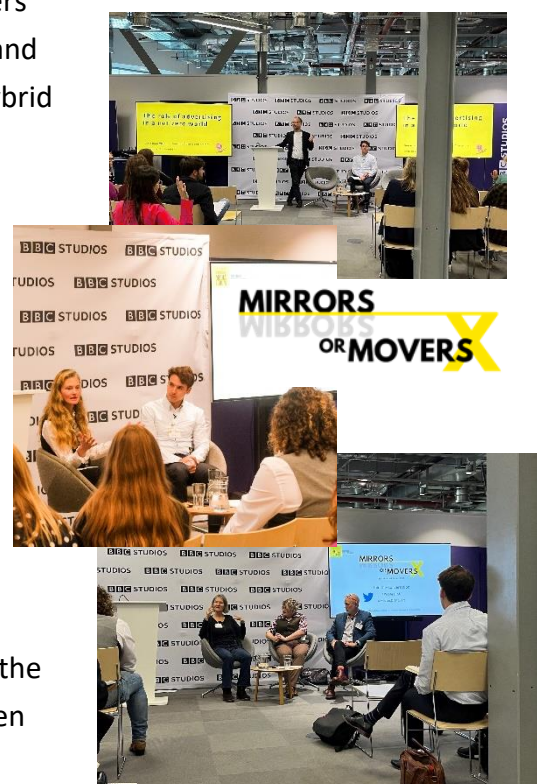
## Mirrors or Movers X

In 2022 we delivered the tenth edition of our Mirrors or Movers (MOM) conferences. This conference focuses on the societal and environmental impacts of media content and was held as a hybrid event at 1 Television Centre, BBC.

This year's conference reflected on a decade of media's role in society and looked ahead to the future. There was plenty to say: it's been a period of great change in which we've seen increasing urgency on both societal and environmental concerns, driving changes across subsectors, channels, and formats. Whatever your view on media's role in sustainability, it's clear that content makers and publishers now need fluency on a range of environmental and social issues, which pushes media companies into new territories.

The conference was open exclusively to forum participants in the morning, creating space for internal forum discussions and then the afternoon was open to the wider public.

Recordings of each session and the full speaker list are available [here](#).



## Online

Between them, the Responsible Media Forum website and the Mirrors or Movers website, originally created for the report and conference of the same name, attracted 4,623 unique visitors during the calendar year.

The [Forum website](#) holds all research published to date by the Forum, a complete list of participating companies and other relevant information. The [Mirrors or Movers website](#) hosts reports and videos, and features information relating to the ten conferences held to date. It also provides a home for future work on this subject by the Forum. The Twitter feed (@WeareRMF), established in 2010, has a follower base of 1,405.



## The participants

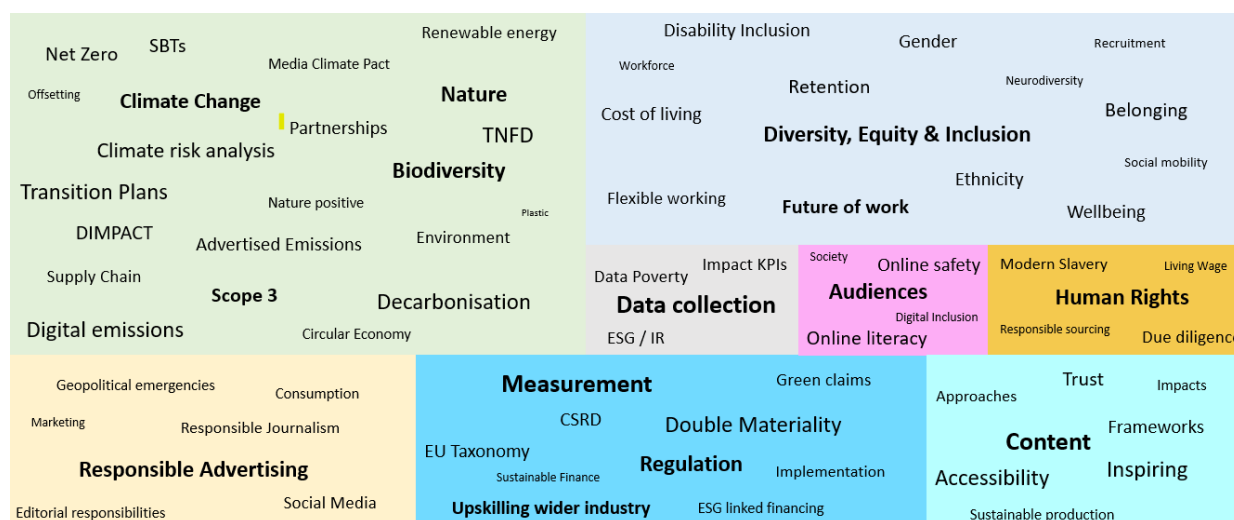
The Responsible Media Forum is a partnership between major media companies to identify and act on the social and environmental challenges facing the sector. The Forum has been going since 2001, starting as a UK initiative but with participants now drawn from around the world.

During 2022, the Forum consisted of 26 participating companies. Participants represent the full breadth of the media spectrum, from public service broadcasters, data analytics providers, advertising agencies and event organisers. Individual representatives include CR and Sustainability Directors, HR Directors, Communications, Marketing, and Investor Relations. Together, we work to define and develop responsible business practices for the media sector.

# Plans for 2023

## Forum meetings

Following our annual consultation, our 2023 programme of activities will reflect priority topics and themes amongst participating companies. The tree map below depicts the issues participants are currently focused on. The larger blocks indicate the issues that are most prioritised across the forum.



We anticipate the 2023 programme to include:

- Three quarterly meetings, in Q1, Q2 and Q4, centred around the priority issues: climate change, diversity, equity & inclusion, content, data collection and measurement.
- One public conference, Mirrors or Movers XI, in Q3
- Specialist sessions focused on niche topics, from sub-issues and smaller blocks in the tree map.
- Working groups where action-led topics and initiatives arise. This will include a working group on net zero and decarbonisation with a focus on supply chains.
- Plus, any additional meetings on an extraordinary basis.

## Mirrors or Movers XI

The Forum plans to host its 11<sup>th</sup> conference in 2023. This will be a one-day hybrid event, hosted in London in the Autumn. The conference will further explore how media content influences society and how media companies can adopt effective strategies to manage these impacts. As in previous years, we expect to make at least part of the full day's

proceedings available freely to the public. Anyone interested in attending can sign up to our mailing list via our [website](#), and follow us on twitter, [@WeareRMF](#).

## Research

Carnstone and the Forum have a track record of producing pieces of original research and analysis and preparing strategic commentary for the sector which are published in the form of reports. Past reports include our recent sequel to Mirrors or Movers; 'The Superpower of Media - Mirrors or Movers II: managing the societal impacts of content' (2020) and '2018 Media Materiality' to name a few.

All publicly available reports by the Forum can be viewed [here](#).

We expect to conduct more research in 2023. The topic will be decided in consultation with Forum participants.

# About the Forum

## Objectives

The Forum provides a platform for participating companies to:

- Learn from each other and leading organisations in other sectors;
- Identify trends and areas for prioritisation based on sound research and robust discussions;
- Engage with stakeholders, be they campaigners, policy makers, academics or peers; and
- Run collaborative projects and events on key issues.

In short, the Responsible Media Forum gives participating companies access to insights and collaboration that few organisations could manage on their own.

## Participating in the Forum

This Report provides an overview of the Forum's activities. In brief, participants enjoy an open environment in which to discuss, under the Chatham House rule, the responsibility issues faced by the sector. The Forum uses its collective size to engage with a range of key stakeholders on pressing issues, both through internal meetings and public events. Lastly, the Forum produces original research.

Participation is restricted to large media companies. Subsidiaries or brands, whether wholly or partially owned, are expected to join the Forum in their own right; however participating companies may occasionally extend invites to their colleagues, who will be admitted on a discretionary basis.

The participation fee for 2023 is £3,600 (+ VAT).

## Income

The Forum budget comes entirely from participation fees:

2018	2019	2020	2021	2022
£48,250	£55,200	£58,125	£69,112.50	<b>£85,800</b>

## Governance

The Responsible Media Forum is a multi-client project run by Carnstone Partners Ltd, with a project team consisting of Daniel Witte, Ben Horn, Rosie Towe and Simon Hodgson. We are open to new participating companies, as well as input and enquiries about media sustainability from investors, academics and the third sector, but please note that we are unable to provide funding for projects and research, however interesting and worthwhile they may be.

Carnstone meets on a 1:1 basis with participants at the end of each year to gather feedback on how the Forum is meeting their needs and to discuss potential themes and speakers for the following year. Actions and initiatives arising from this review are then discussed and agreed by participants in a consensual manner.

Daniel Witte is the first point of contact for stakeholders and new participant enquiries:

**Email:** [info@responsiblemediaforum.org](mailto:info@responsiblemediaforum.org) **Telephone:** +44 (0) 7384 518837